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Golf Participation in the United States 1986

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Introduction

The purpose of NGF research is to gather and disseminate reliable information which can be used by the NGF, its members and others who are involved in the golf industry to promote golf and help make better golf related business decisions.

This is the second edition of the National Golf Foundation's exclusive report on golf participation in the United States. Those who purchased the first edition will find this report greatly expanded with more detail presented on various segments of the golfer population. Regional variations in golf participation and golfer demographics are also more fully discussed in this edition.

This report is part of a larger series of NGF research reports. As the golf industry's research organization, the NGF regularly conducts studies on various aspects of American golfers and golf facilities. The NGF also conducts special studies on selected topics ranging from attitudes of non-golfers towards golf to the projection of golf's growth in the decades ahead.

The results of this survey are useful to several groups. Suppliers of golf related products and services should find the information in this report invaluable when sizing the golf consumer market and determining the nature of this market. The results should be helpful to advertisers when planning how best to reach and appeal to potential golfing customers. The report, highlighting patterns of change in the golfing population, can also be of considerable use when developing future business plans.

The improvements in this year's report came about as a result of many conversations with purchasers of the first report. NGF encourages this feedback and will strive to incorporate it into next year's edition of this continuing series of annual reports on *Golf Participation in the United States*.

Colin Hegarty
Research Department
National Golf Foundation

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Summary

This report is the result of a survey of 57,000 individuals around the U.S. taken in January, 1987.

It was found that 20.2 million people played golf in 1986. This represents 9.1 percent of the U.S. population over the age of five. Twenty point two million players represents a 15 percent increase over the number of 1985 participants. This large increase is significant in light of a three percent rate of annual increase during the past decade. The large increase in golf participants in 1986 was mirrored by golf related sales, which were up 39.6 percent.

The average play frequency of golfers in 1986 was 20.2 rounds. Forty-eight point eight percent of golfers were very infrequent participants, playing less than eight rounds. Frequent players, representing 24 percent of golfers and playing more than 25 rounds last year, accounted for 69 percent of all rounds played. It is estimated that 421 million rounds of golf were played in 1986. This represents a 1.4 percent increase in rounds played over 1985. Golf participation was up 15 percent while rounds played rose only 1.4 percent due to a slight drop in average play frequency. In 1985 golfers averaged 21.7 rounds each, while in 1986 they averaged 20.2 rounds.

Golf continues to be a male dominated sport with 76.1 percent of golfers being male. However, the situation is changing. Women are coming into golf in greater numbers. In 1985, 20.7 percent of golfers were female, but by 1986, this figure had risen to 23.9 percent. The situation becomes more sharply focused when analyzing the people taking up golf for the first time. Twenty-one percent of first time golfers in 1983 were women, whereas in 1986, 37 percent were women.

The average age of the golf population is 39.4 years old. Juniors, under the age of 20, account for 11.5 percent of all golfers. The total number of junior players was up 16 percent in 1986. However, a worrying trend is noted in the falling percentage of first time players who are junior. In 1983, 42 percent of first time golfers were junior, whereas by 1986, only 32 percent were junior. Seniors, golfers over the age of 60, make up 16.5 percent of the golf population. The impact of seniors on the game is stronger than their numbers might suggest. Tending to be very frequent players, they account for 33 percent of all rounds played.

Players who predominantly play on public facilities account for 77 percent of all golfers and 66 percent of all rounds played. Public golfers, averaging 17.6 rounds a year, tend to be less frequent participants than their private counterparts who average 28.1 rounds annually. Private golfers are wealthier than public golfers with household incomes averaging $47,900 versus average incomes of $30,000 for public players. The average age of private golfers at 48.7 years is ten years older than the average for public players.

Golf participation rates vary considerably around the U.S. Participation is highest in the northern states where 12-14 percent of the population play golf. The South, with the exception of the tourist driven South Florida and Carolinas markets, generally has low golf participation with only three to six percent of the population playing golf. Golfer demographics also vary considerably by region. For example, female participation in golf is highest in the North where approximately 25 percent of golfers are female, and lowest in the South, where approximately 15 percent of golfers are female.

Methodology

This survey was conducted by mail using the consumer mail panel (CMP) of Market Facts, Inc. The CMP is demographically weighted to census statistics, being weighted on: geographic region, household income, population density, race and household size.

Thirty thousand questionnaires were mailed to the panel January 5, 1987. By February 18th over 23,000 usable questionnaires had been received, representing responses from 57,079 individuals.

The questionnaire, included in the appendix, was designed to determine both current and past year golf participation. The questionnaire did not have to cover demographic details such as region, household income, education and occupation, these details already being known for each member of the CMP. The high response rate of 77 percent is typical of mail panel surveys. As an additional step to ensure the representativeness of the results, the return sample was weighted (adjusted) to match U.S. census statistics on key demographic variables. The margin of error is estimated to be plus or minus 0.2 percent at the 95 percent confidence level for the national participation rates. The survey examines golf participation for the U.S. population over the age of five. The definition of a 1986 golf participant is an individual who has played at least one round of golf in 1986.

The NGF golf participation survey, first conducted in 1985, is replicated annually. Each year the survey is conducted using exactly the same technique. The survey is mailed in January using an identical questionnaire each year. Repeating the survey each year will enable trends in golf participation to be accurately tracked.

Chapter 1

The U.S. Golfing Population

Twenty point two million people played golf in the U.S. in 1986. This represents 9.1 percent of the U.S. population over the age of five (222.182 million people). Figure 1.1 presents a demographic profile of the golfing population. The figure shows golf continuing to be a male dominated sport with 76.1 percent of the players being male. However, as will be discussed in Chapter 2, female players are coming into golf in ever increasing numbers.

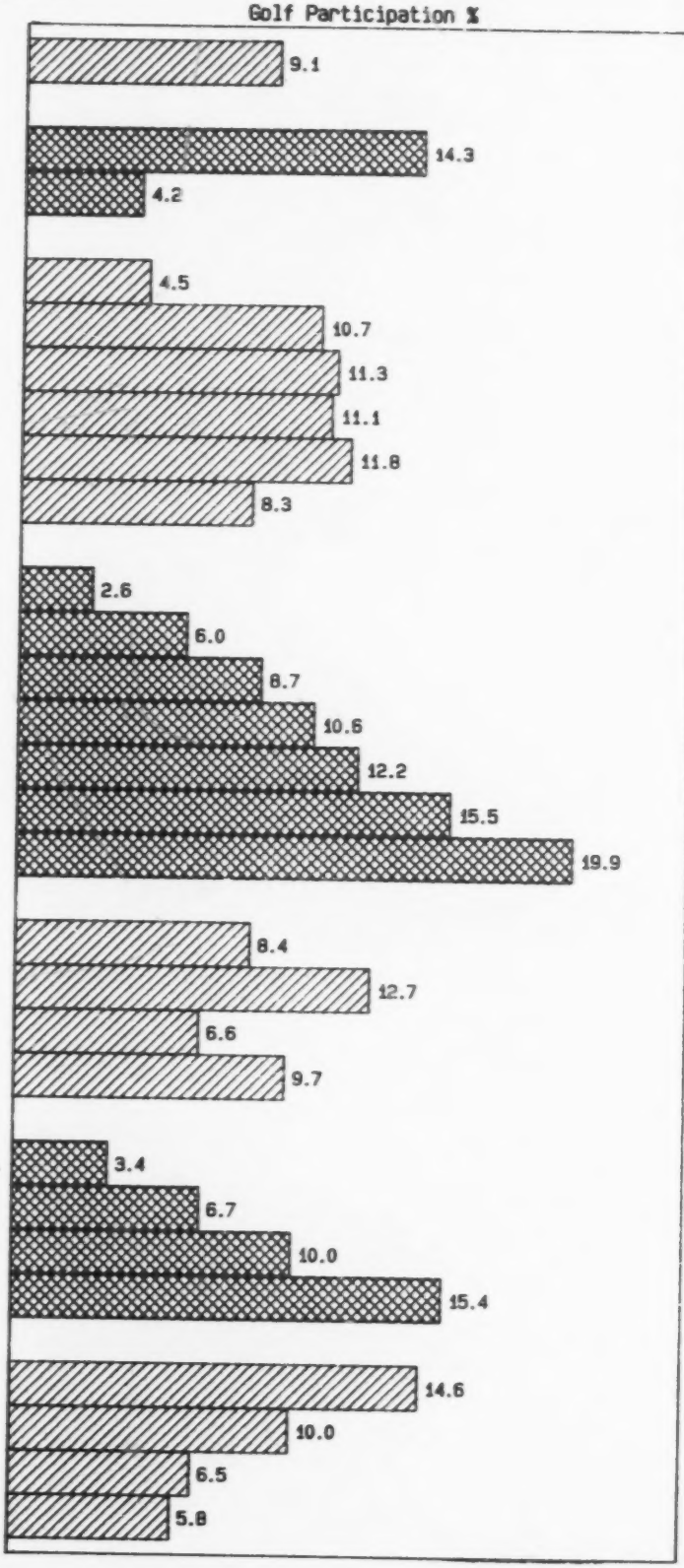
The age distribution of the U.S. golfer shows a mean age of 39.4 years. Peak participation rates of 11.8 percent are seen in the 50-59 year old age bracket. The greatest proportion of golfers (44.7 percent of all players) occur in the more heavily populated baby-boomer age brackets (20-40 years old). Figure 1.2 breaks out golf participation by age in finer detail than that presented in Figure 1.1.

Analysis of household income shows a very strong relationship between golf participation and higher income levels. Only 2.6 percent of people from households with an annual income of less than $10,000 play golf, whereas 19.9 percent of people from households with an income of over $75,000 play golf. The golf population is far wealthier than the U.S. population in general. The mean annual household income of the U.S. golfing population is $41,000 compared with a U.S. average household income of $30,600. Forty-three point four percent of golfers come from households with incomes exceeding $50,000 a year, while only 26.6 percent of the U.S. population come from $50,000 plus households.

Golf participation shows a very marked regional pattern. Participation is highest in the North Central region, essentially the Great Lakes area, where 12.7 percent of the population play golf. Participation is lowest in the Southern region where 6.6 percent of the people play golf. Further analysis of regional variations in golf participation and the regional characteristics of the golfing population reveal

Demographic Profile Of All Golfers

Figure 1.1



	% of Golfer Population	Population (millions)
Total	100.0	20.20
Male	76.1	15.37
Female	23.9	4.83
Age		
5-19	11.5	2.32
20-29	22.8	4.61
30-39	21.9	4.42
40-49	14.5	2.93
50-59	12.8	2.59
>60	16.5	3.33
Income ($1,000):		
<10	4.5	0.91
10-20	14.2	2.87
20-30	19.1	3.86
30-40	18.8	3.80
40-50	16.7	3.37
50-75	18.6	3.76
>75	8.1	1.64
Region:		
North East	20.1	4.06
North Central	34.7	7.01
South	24.7	4.99
West	20.5	4.14
Education:		
Non High School Grad.	5.9	1.19
High School	25.3	5.11
Some College	28.2	5.70
College Grad.	40.6	8.20
Occupation:		
Prof./Managerial	51.6	10.42
Clerical/Sales	17.7	3.57
Blue Collar	23.2	4.69
Other	7.5	1.51

Figure 1.2 **GOLF PARTICIPATION BY AGE**

Age	Participation Rate Percent	Percent of 1986 Past Golfing Population	Golfers (millions)
5-14	2.4	4.4	0.889
15-19	8.2	7.5	1.515
20-24	7.4	7.5	1.515
25-29	13.8	15.2	3.07
30-34	11.1	11.1	2.242
35-39	11.6	10.8	2.182
40-44	11.6	8.3	1.677
45-49	10.4	6.2	1.252
50-54	12.4	6.6	1.333
55-59	11.3	6.2	1.252
60-64	13.4	7.2	1.454
65>	6.4	9.3	1.879

some new insights into the golf market. Chapter 7 covers these regional variations in golf participation in considerable detail.

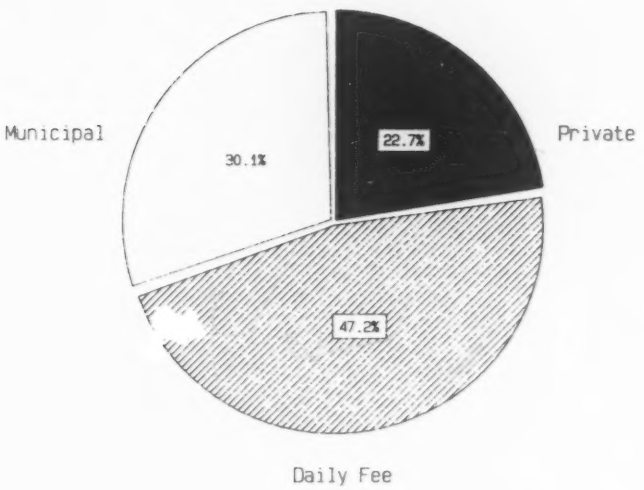
Golf participation and education are very strongly related, the golf population tending to be better educated than the population in general. Only 3.4 percent of people from households whose head is not a college graduate play golf compared to 15.4 percent of people playing golf from households whose head has a college degree. Forty point six percent of golfers come from households whose head has a college degree, while only 21.1 percent of the U.S. population come from households headed by a college graduate.

The occupation of the household head is also strongly related to golf participation. Six point five percent of people from households headed by blue-collar workers play golf, while 14.6 percent of people from households headed by professional/managerial workers play golf. Fifty-one point six percent of golfers

are from professional households while 34.8 percent of the U.S. population in general are from professional households.

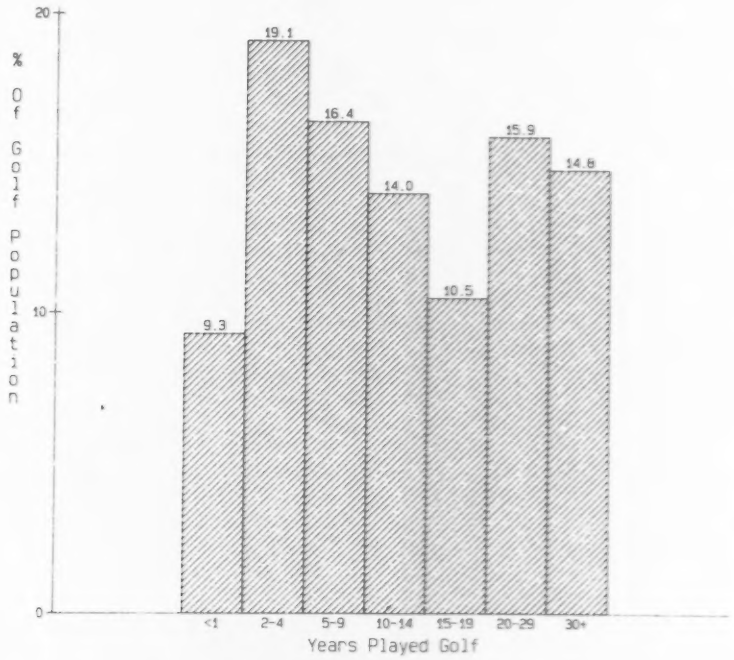
Analysis of the types of facility used by golfers shows 22.7 percent of the golf population to be private club players. A private player is defined as one who plays 50 percent or more of their rounds of golf on private courses. A similar method of definition is used for municipal and daily fee players. Figure 1.3 presents a breakdown of the golfing population by private, daily fee and municipal classifications.

Figure 1.3 **WHERE GOLFERS PLAY**



Examination of the number of years golfers have been in the game shows an average of 14 years golfing experience. A more detailed distribution is shown in Figure 1.4. A surprisingly large proportion of golfers (14.8 percent) have played golf for a very long time, more than 30 years. Twenty-eight point four percent of golfers have played for less than five years.

Figure 1.4 **LENGTH OF GOLF EXPERIENCE**

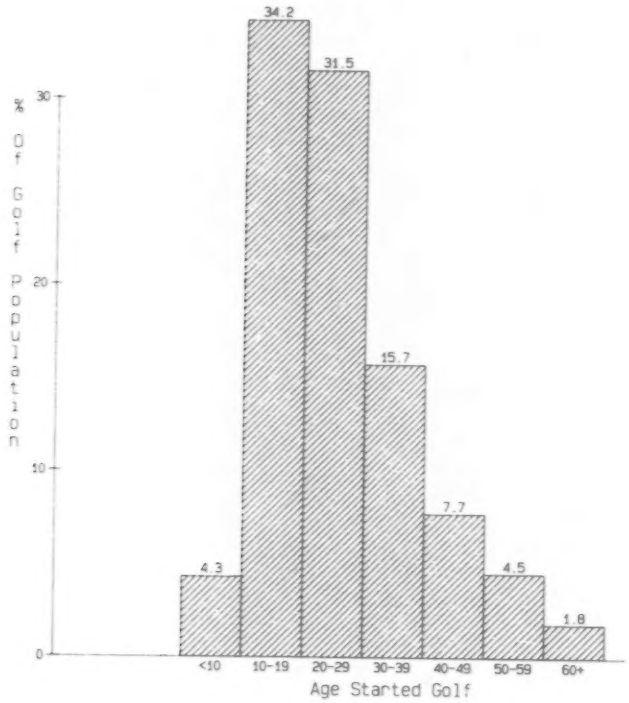


Examining the age at which golfers start playing, it is seen that 70 percent of golfers take up the game under the age of 30. The mean age at which golfers start playing was found to be 25.7 years old. The likelihood of taking up golf drops rapidly in the middle and older age groups, as shown by Figure 1.5. Only 1.8 percent of golfers take up the game over the age of 60.

COMPARISON OF 1986 AND 1985 GOLF PARTICIPATION

When comparing the 1986 survey with the survey taken in 1985, a considerable increase in golf participation is noted. The 1985 survey showed eight percent of the U.S. population over five years old played golf. This projected to 17.5 million players. The 1986 survey, with a 9.1 percent participation rate projecting to 20.2 million players, represents a 15 percent increase in the golf population. Accurate historical data on golf participation does not exist prior to 1985, thus the 15 percent increase in 1986 over 1985 cannot be put in perspective in terms of trend analysis. However, estimates of golf participation in previous years suggest a rate

Figure 1.5 **AGE WHEN STARTED GOLF**



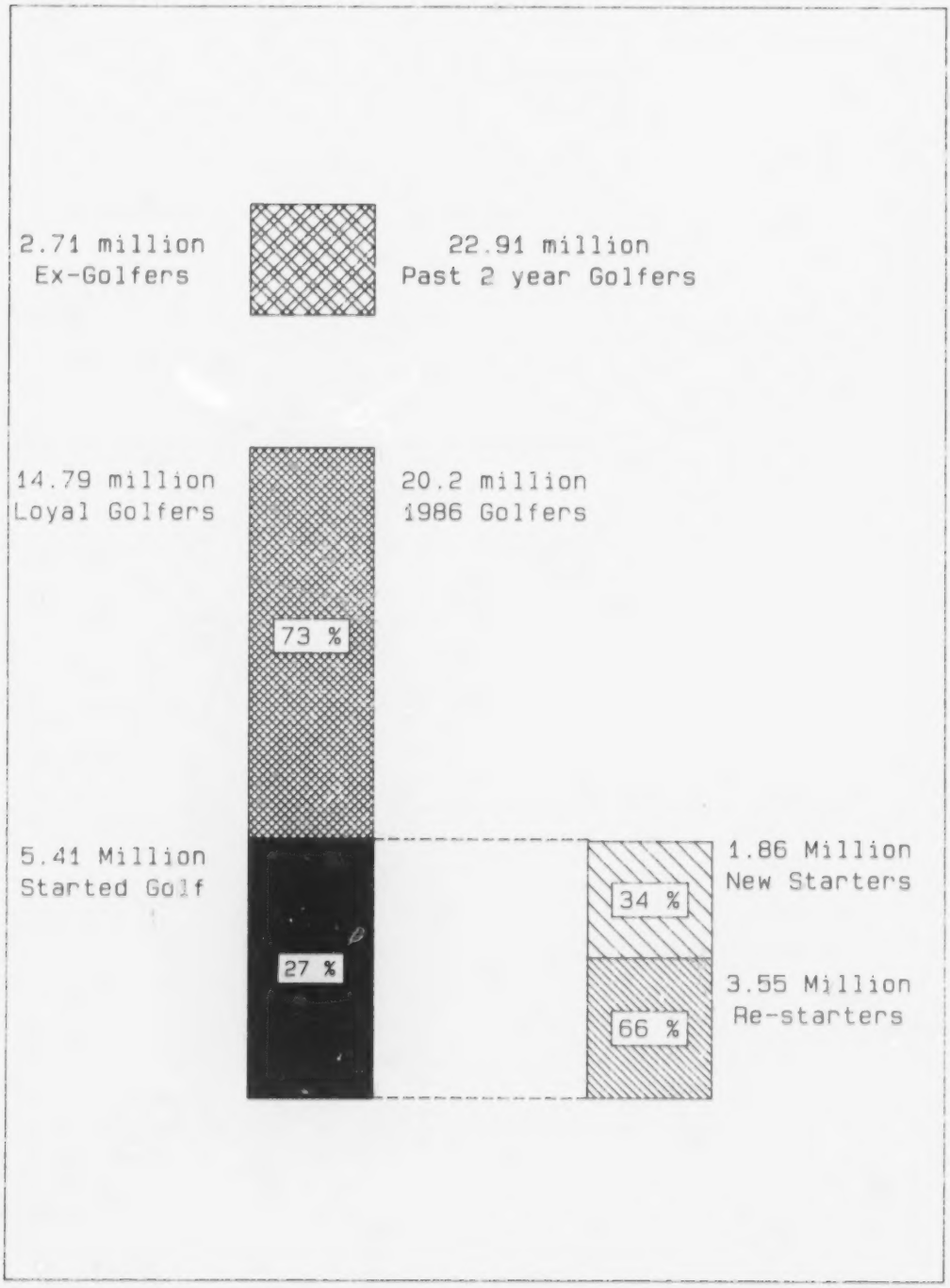
of increase of between three and six percent annually. Thus, a 15 percent increase in one year represents a considerable jump.

The 1986 NGF publication *Golf Projections 2000* suggested that the golf industry was potentially on the verge of its third major boom of the century. The large increase in golf participation seen in 1986 may be the beginning of such a boom. Looking at other sources of evidence to see if 1986 really was a bumper year for golf, the April 1987 edition of *Golf Shop Operations* carried an article titled "The Bull in the Golf Shop." The article presented the findings of a survey of golf shop sales in 1986. The survey showed a 39.6 percent increase in sales in 1986 over 1985, the largest increase recorded since GSO started its surveys. The combination of 1986 showing a large increase in golf participation, along with a large increase in golf related sales, is strong evidence that the year was a boom year for the golf industry.

The reasons for the healthy increases in 1986 are unknown. One possibility is the excitement surrounding Nicklaus winning the 1986 Masters Tournament. The Masters traditionally kicks off the golf season for many players, and excitement about the Masters result may have encouraged new players to try the game and other players who haven't participated for a number of years to re-start. Another contributing factor to the health of the golf industry in 1986 may have been the large increase of consumer disposable income (up 5.08 percent over 1985), primarily the result of the low inflation rate of 1.4 percent. The U.S. population, with more money in their pockets, would have had greater opportunity to play golf.

Analysis of the golf population shows a large segment of players to be very transient. Fifteen point four percent of 1985 golfers (2.71 million) did not play golf in 1986, while 27 percent of 1986 golfers (5.41 million) did not play golf in 1985. Figure 1.6 outlines the proportion of the golf population entering or leaving the game in 1986. The ex-golfers shown in the figure are defined as players who participated in 1985 but not 1986. The starter population, those players who participated in 1986 but not in 1985, is divided into two sub-classifications. The new starter population, comprising 34 percent of starters, are people who have never played golf before. The re-starters, comprising 66 percent of the starters, are people who have played golf at some point previously in their lives but did not participate in 1985.

Figure 1.6 **CHANGES IN THE GOLF POPULATION**



Chapter 2

New Starters and Recent Quitters

STARTERS

Of the 20.2 million golfers in 1986, 27 percent (5.41 million) can be called starters, players who golfed in 1986 but not in 1985. Of the starters in 1986, 3.55 million can be called re-starters, players who didn't golf in 1985 but have played golf at some point previously in their lives. One point eight six million of the 1986 starters can be called new-starters, players who have never golfed before (Figure 2.1). New-starters are tremendously important to the game of golf, representing the inflow of first time customers to the industry.

Figure 2.1 **5.41 MILLION STARTERS**

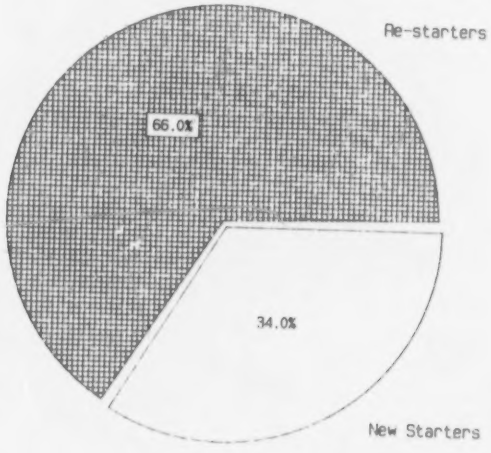
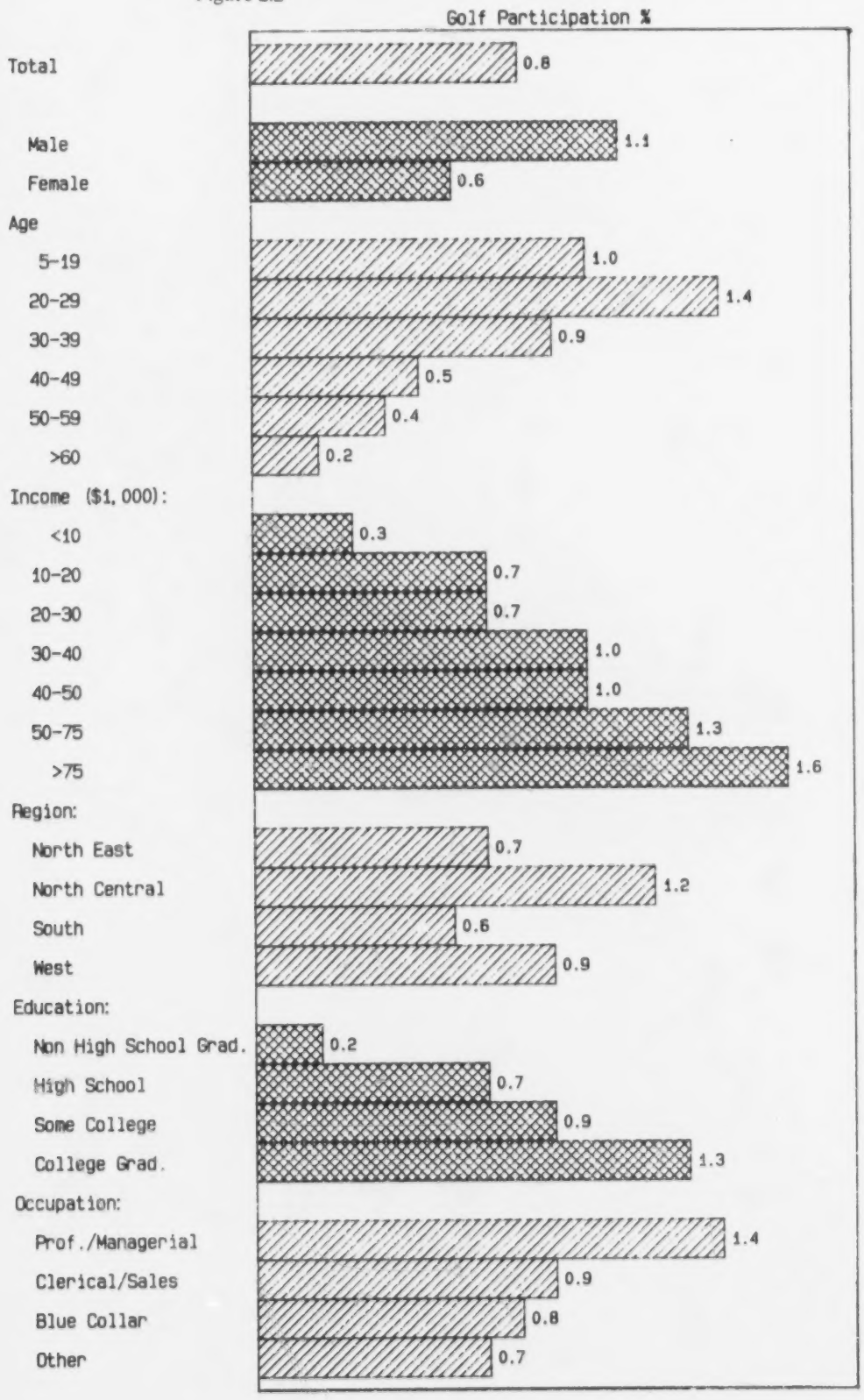


Figure 2.2 presents a demographic profile of the 1986 new-starter population. The figure shows that 37 percent of new starters were female, whereas only 23.9 percent of all current golfers are female. The proportion of new starters who are female has

Demographic Profile Of New Starters

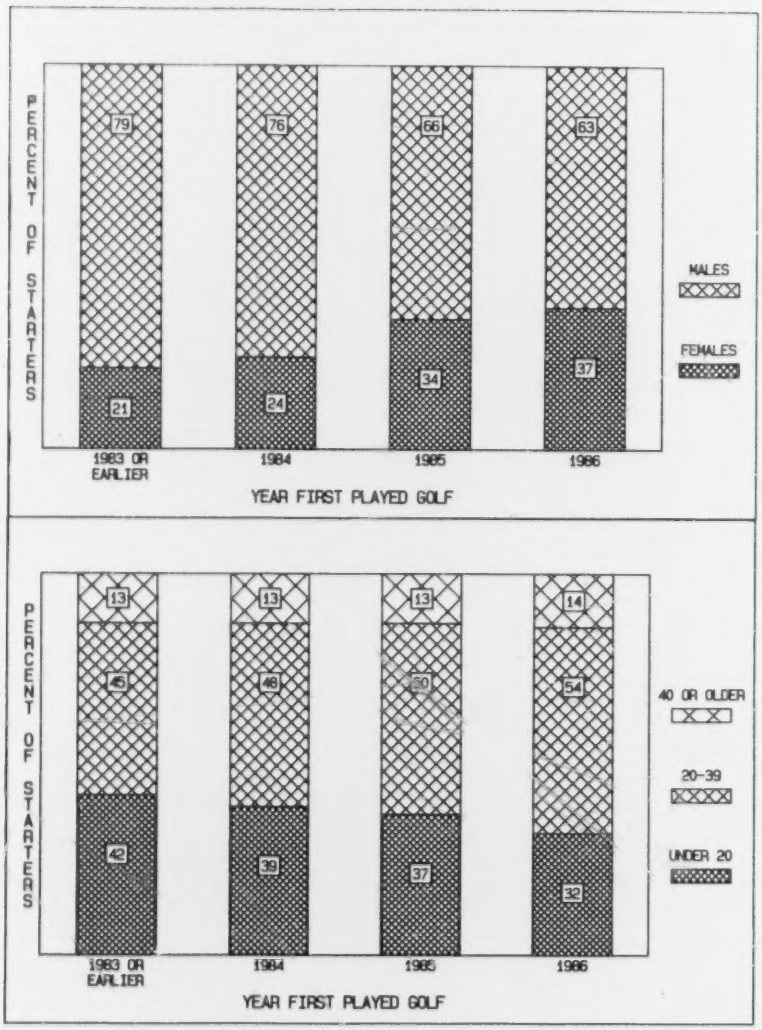
Figure 2.2



	% of Golfer Population	Population (millions)
Total	100.0	1.86
Male	63.0	1.17
Female	37.0	0.69
Age		
5-19	30.1	0.56
20-29	32.8	0.61
30-39	20.0	0.37
40-49	7.8	0.15
50-59	5.1	0.09
>60	4.2	0.08
Income ($1,000):		
<10	4.8	0.09
10-20	18.5	0.34
20-30	17.1	0.32
30-40	20.2	0.38
40-50	15.0	0.28
50-75	17.5	0.32
>75	6.9	0.13
Region:		
North East	19.1	0.36
North Central	37.0	0.69
South	23.3	0.43
West	20.6	0.38
Education:		
Non High School Grad.	3.8	0.07
High School	29.3	0.55
Some College	28.1	0.52
College Grad.	38.8	0.72
Occupation:		
Prof./Managerial	47.9	0.90
Clerical/Sales	15.4	0.28
Blue Collar	27.0	0.50
Other	9.7	0.18

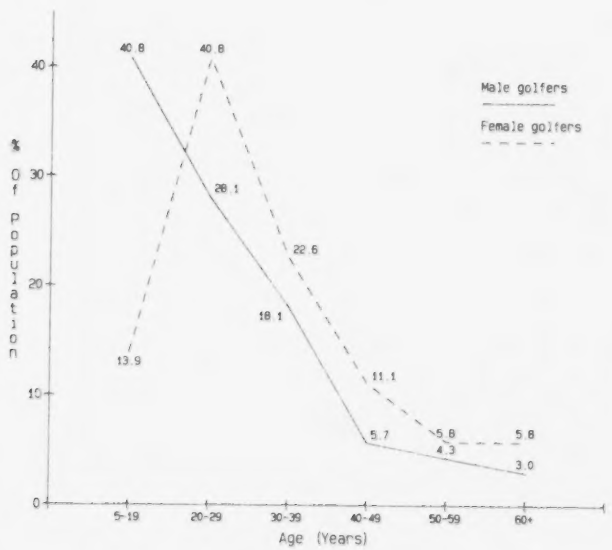
been rising in the past few years, as shown in Figure 2.3. In 1983 and earlier, 21 percent of all new starters were female. This proportion rose steadily over the next three years to 37 percent of new starters being female in 1986. The trend of females taking up golf in greater numbers is exciting for the industry. There is tremendous growth potential for the game of golf if it can lose its image as a male sport and attracting large numbers of female participants.

Figure 2.3 **THE CHANGING STRUCTURE OF THE NEW STARTER POPULATION**



The mean age of new starters in 1986 was 28.1 years. This is well below the mean age of 39.4 years of the overall golfing population. People are most likely to try golf for the first time when they are younger. The statistics show 62.9 percent of new starters are under the age of 30. Figure 2.4 compares the age distribution of new starters by sex. Males show a marked tendency to take up golf as teenagers, 40.8 percent of male new-starters being under the age of 20. Females show a strong tendency to take up the game in their twenties. Forty point eight percent of female new starters are shown to be between the ages of 20 and 30. Figure 2.3 shows the proportions of new starters from different age groups over time. The figure highlights a worrying trend that shows a falling proportion of new starters being junior players. Forty-two percent of new starters in 1983 or earlier were juniors. This proportion of junior players has dropped steadily to 32 percent of new starters in 1986. This statistic should be approached carefully. The proportion of new starters who are juniors may have dropped while the total number of juniors who are taking up the game or the proportion of juniors taking up golf may have increased.

Figure 2.4 **AGE OF NEW STARTERS**



The new starter population, like the golf population in general, is strongly biased toward higher income groups. One point eight percent of the population from households with an income greater than $75,000 annually tried golf for the first time in 1986 whereas only 0.6 percent of the population from households earning less than $10,000 tried golf for the first time in 1986. Though people from higher income households are more likely to try golf, the majority of new starters come from the more heavily populated middle income households. Forty-one point three percent of the new starter population come from households in the $20,000-40,000 income bracket.

New starters tend to be less frequent golf participants than the golf population in general. The average play frequency of new starters was 7.7 rounds in 1986 compared to 20.2 rounds for golfers in general. Figure 2.5 compares the play frequency distribution of new starters with that for the golf population in general. The figure shows that 44.9 percent of new starters played less than three rounds in 1986, whereas 21.3 percent of golfers in general played less than three rounds.

Figure 2.5 **PLAY FREQUENCY**

Rounds Played 1986	New Starters	Golf Population
1-2	44.9	21.3
3-7	31.4	27.5
8-24	17.2	27.1
25+	6.5	24.1

QUITTERS

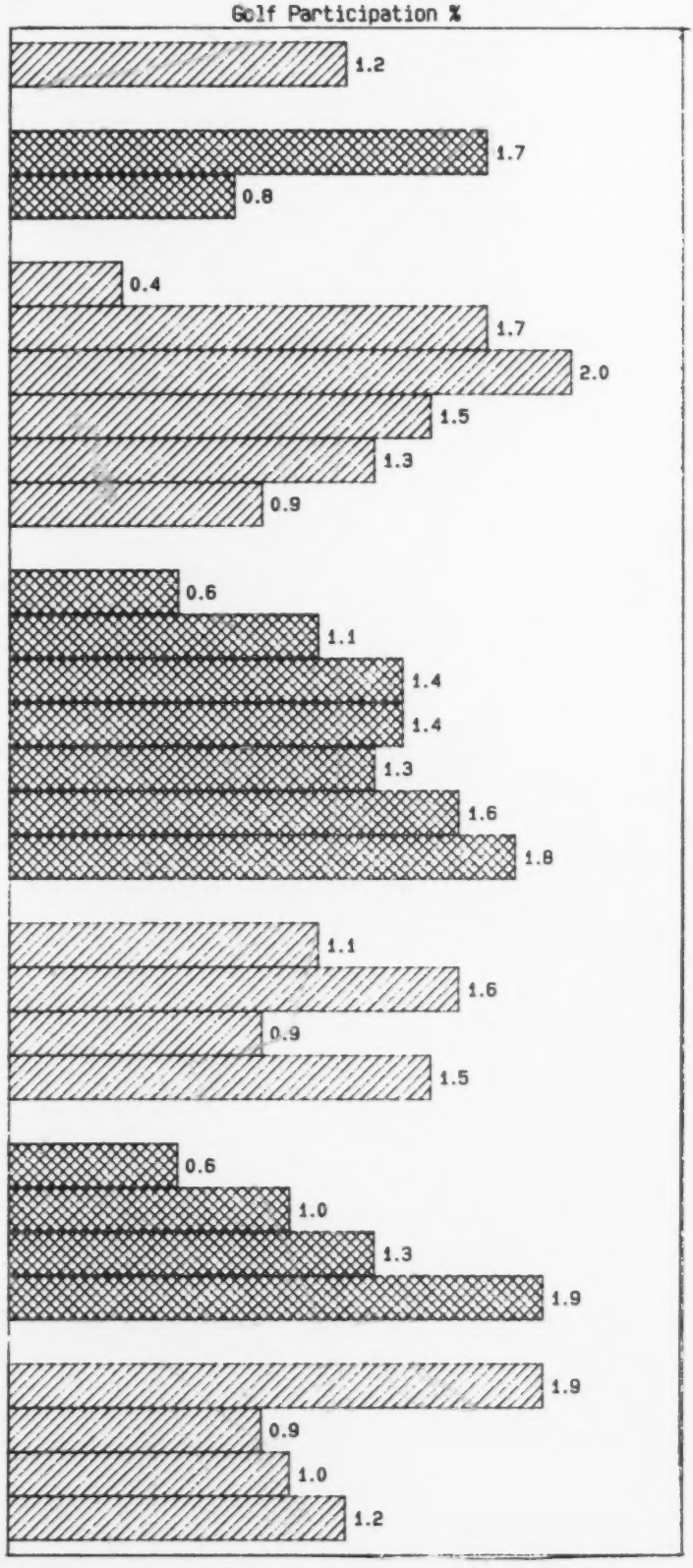
Of the 17.5 million people who played golf in 1985, 15.5 percent (2.71 million) can be termed recent quitters; they did not play in 1986. Analysis of the recent quitter population may be superfluous since these people are no longer involved in golf. However, it is important to understand who is quitting golf, and why they are quitting. Such understanding opens the way for preventative measures to be taken to stop players from being lost from the game.

Figure 2.6 presents a demographic profile of the 2.71 million quitters in 1986. The profile shows that female golfers are more likely to be quitters. Thirty-three point three percent of the quitters were female, whereas only 23.9 percent of golfers in general were female. Examination of the age distribution of the recent quitter population shows that people are more likely to quit golf in their middle years. Sixty-eight point six percent of quitters come from the 20-50 year-old age bracket while 59.2 percent of golfers in general come from these age groups. These statistics suggest that golfers are less likely to quit as seniors. Sixteen point five percent of golfers are seniors, and only 12.5 percent of quitters are seniors. Analysis of the age distribution of the recent quitter population by sex shows little difference in the behavior of the two groups, as shown by Figure 2.7. However, female quitters are slightly more likely to be in the over 50 age bracket than male quitters.

Recent quitters are more likely to be from lower income households than the golf population in general. The mean income of the quitter population is $35,700 annually compared to the mean income of the golf population in general which is $41,000 annually. Forty-eight point four percent of quitters are from households with an income less than $40,000 compared to 37.8 percent of the overall golf population being from $40,000 or less households. The education and occupation distribution of the recent quitter population is roughly in line with the overall golf population, though there is a small tendency for quitters to be less educated and in non-professional occupations.

Demographic Profile Of Recent Quitters

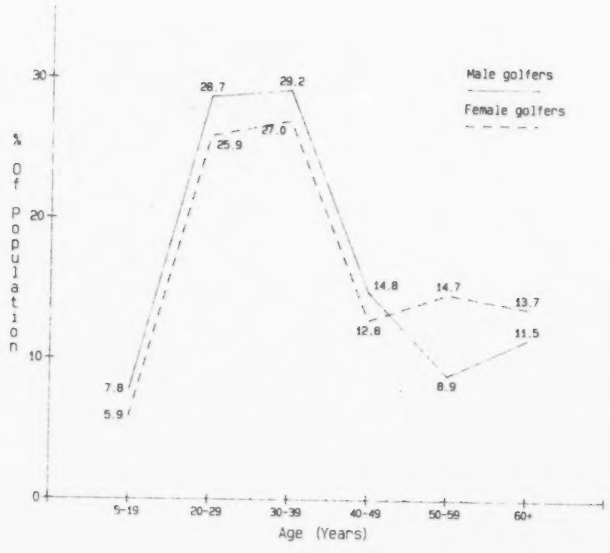
Figure 2.6



	% of Golfer Population	Population (millions)
Total	100.0	2.71
Male	66.7	1.80
Female	33.3	0.90
Age		
5-19	7.1	0.19
20-29	28.1	0.76
30-39	29.3	0.80
40-49	11.2	0.30
50-59	11.9	0.32
>60	12.4	0.34
Income ($1,000):		
<10	7.4	0.20
10-20	18.8	0.51
20-30	22.2	0.60
30-40	19.1	0.52
40-50	12.3	0.33
50-75	14.7	0.40
>75	5.5	0.15
Region:		
North East	18.7	0.51
North Central	33.2	0.90
South	24.7	0.67
West	23.4	0.63
Education:		
Non High School Grad.	7.0	0.20
High School	27.1	0.73
Some College	28.1	0.76
College Grad.	37.8	1.02
Occupation:		
Prof./Managerial	49.7	1.35
Clerical/Sales	11.9	0.32
Blue Collar	26.5	0.72
Other	11.9	0.32

Figure 2.7

AGE DISTRIBUTION OF RECENT QUITTER POPULATION



Chapter 3

Frequency of Play

Golfer play frequency varies enormously. Some golfers play everyday, some play only once a year. The mean play frequency of the U.S. golfer in 1986 was 20.2 rounds while the median play frequency was 12 rounds. The median play frequency is pulled well below the mean due to the large number of infrequent players. Based upon the complete distribution of golfer play frequency, it is projected that in 1986 there were 421 million rounds of golf played in the United States.

Figure 3.1 presents a simple distribution of play frequency for the U.S. golfing population. This figure highlights a rather startling fact, almost 50 percent of golfers are very infrequent players, playing less than eight rounds of golf a year. The frequent players, those who play 25 or more rounds a year, comprise 24 percent of the golfing population but account for almost 69 percent of the rounds played. This relationship is shown in Figure 3.2.

Figure 3.1 **PLAY FREQUENCY DISTRIBUTION**

Golfer Type	Play Frequency (rounds)	Percentage of Golfers	Golfers (millions)
Infrequent	1-2	21.3	4.3
Occasional	3-7	27.5	5.5
Average	8-24	27.1	5.5
Frequent	25 or more	24.1	4.9
		100.0	20.2

Figure 3.2 **ROUNDS PLAYED**

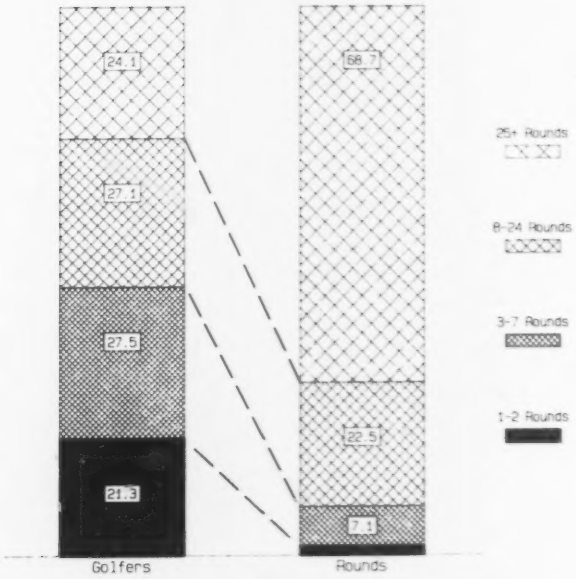


Figure 3.3 compares some basic play frequency statistics for the years 1985 and 1986. A slight drop in mean play frequency occurred in 1986. At present it is not known if this drop is a statistical artifact or the beginning of a trend. Future annual participation surveys will shed more light on this situation. The median play frequency is found to have risen from eight rounds in 1985 to 12 rounds in 1986. Total rounds played showed an increase of 1.4 percent. However, the increase in rounds played was small in light of the 15 percent increase in golf participation over the same period. The disparity of 15 percent more golfers with only 1.4 percent more rounds is due to the drop in mean play frequency.

Figure 3.3 **COMPARISON OF 1985 WITH 1986**

	1985	1986
Mean Play Frequency	21.8	20.2
Median Play Frequency	8.0	12.0
Total Rounds Played (millions)	415.0	421.0

Figure 3.4 compares the golf population play frequency distribution between the years 1985 and 1986. The figure in part explains the drop in mean play frequency. The proportion of frequent players playing more than 36 rounds a year was seen to decline. At the same time, the proportion of infrequent players, playing less than five rounds a year, was seen to increase.

Figure 3.4 **COMPARISON OF 1986 AND 1985 PLAY FREQUENCY DISTRIBUTIONS**

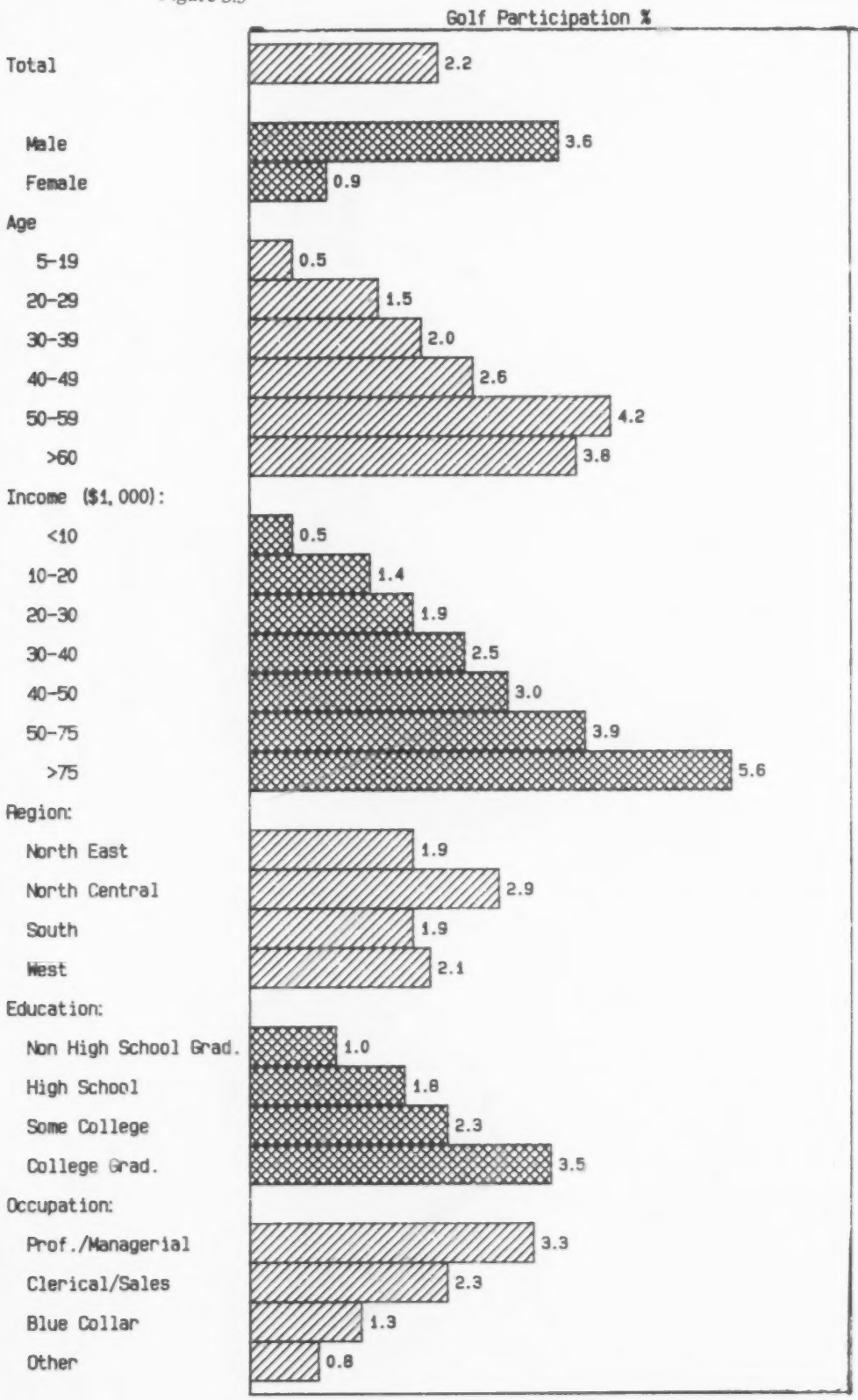
Rounds Played 1986	Percentage of 1985 Golfer Population	Direction of Change	Percentage of 1986 Golfer Population
1-2	21.0	--->	21.3
3-4	14.7	--->	15.2
5-7	13.4	<---	12.3
8-12	13.8	--->	14.2
13-24	11.7	--->	12.9
25-36	8.6	--->	9.1
37-60	8.6	<---	8.0
61+	8.2	<---	7.0

Figures 3.5 and 3.6 present demographic profiles of the frequent and infrequent golfer populations. It should be stressed that the 4.8 million frequent golfers, playing 69 percent of all rounds, are very important to the industry, while the 4.2 million infrequent golfers are relatively unimportant as they account for only 1.7 percent of rounds played.

Age is strongly related to frequency of play and this is highlighted in Figure 3.7. The figure shows the majority of frequent players to be over 40 (65.5%) while the majority of infrequent players are under 40 (87.1%). There is a small tendency for frequent players to be from higher income groups while infrequent players come from lower income groups. Regionally, frequent golfers are more likely to come from the Southern region, while infrequent players are more likely to come from the North Central region. This regional pattern makes sense climatically with Southern players taking advantage of four season golf to play a few more rounds.

Demographic Profile Of Frequent Golfers

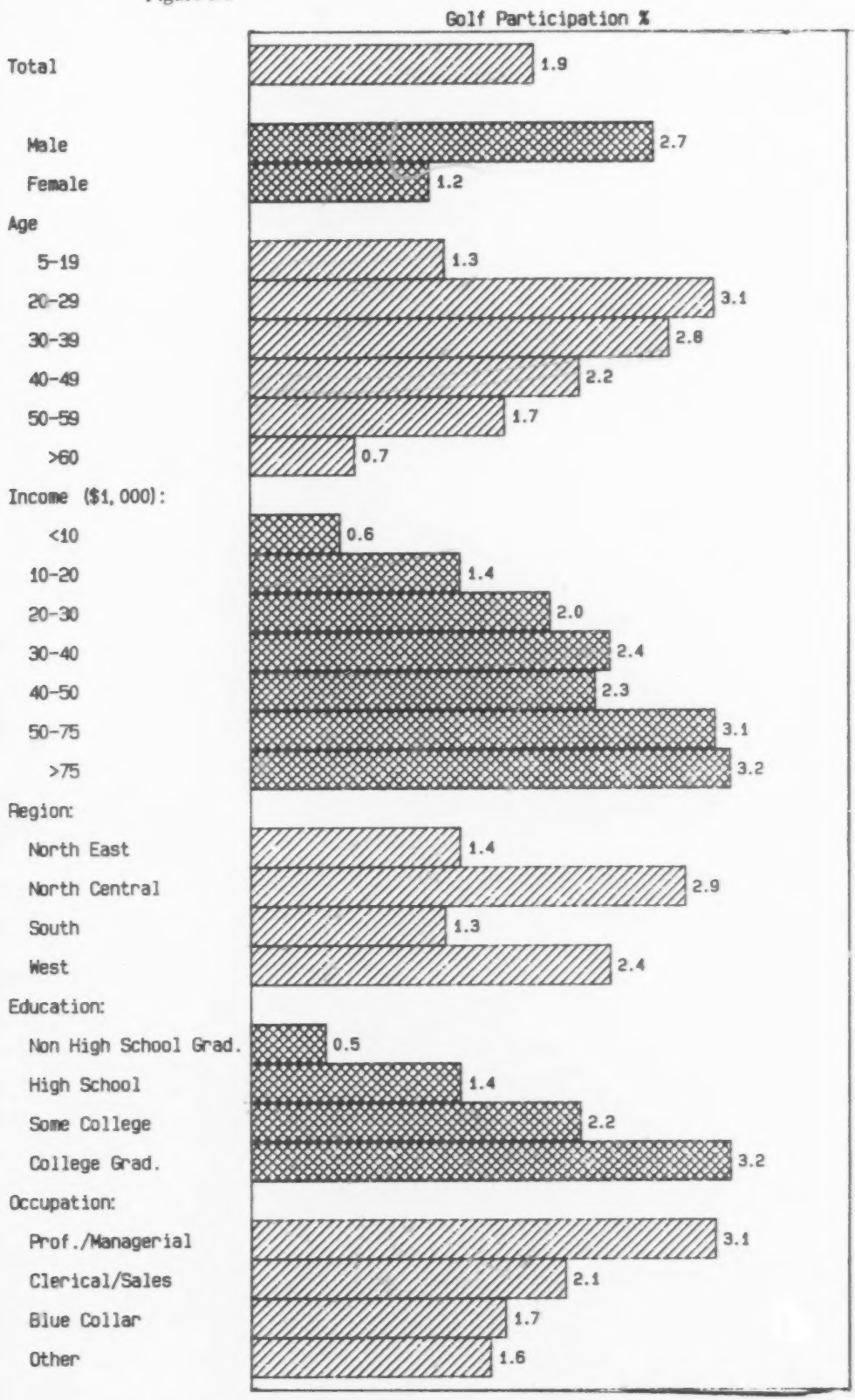
Figure 3.5



	% of Golfer Population	Population (millions)
Total	100.0	4.82
Male	79.1	3.81
Female	20.9	1.00
Age		
5-19	5.0	0.24
20-29	13.4	0.64
30-39	16.1	0.78
40-49	14.5	0.70
50-59	19.1	0.92
>60	31.9	1.54
Income ($1,000):		
<10	3.9	0.19
10-20	14.0	0.68
20-30	17.2	0.83
30-40	18.9	0.91
40-50	16.8	0.81
50-75	19.7	0.95
>75	9.5	0.45
Region:		
North East	19.3	0.93
North Central	32.7	1.58
South	29.4	1.41
West	18.6	0.90
Education:		
Non High School Grad.	7.0	0.34
High School	27.5	1.33
Some College	27.1	1.30
College Grad.	38.4	1.85
Occupation:		
Prof./Managerial	53.9	2.60
Clerical/Sales	19.2	0.92
Blue Collar	22.0	1.06
Other	4.9	0.24

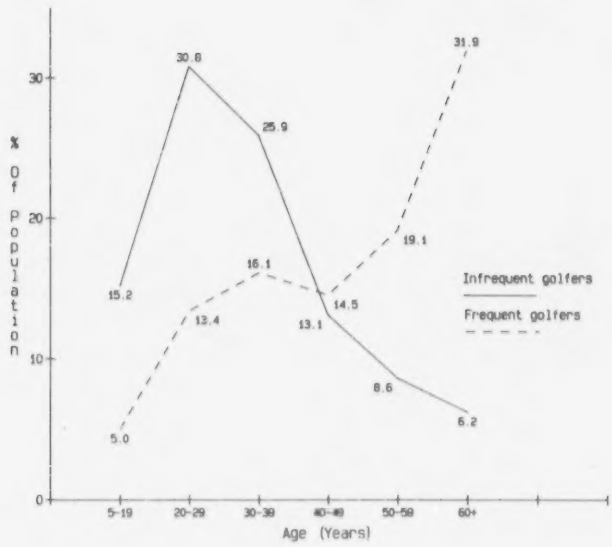
Demographic Profile Of Infrequent Golfers

Figure 3.6



	% of Golfer Population	Population (millions)
Total	100.0	4.26
Male	68.8	2.93
Female	31.2	1.33
Age		
5-19	15.2	0.65
20-29	30.8	1.31
30-39	25.9	1.10
40-49	13.3	0.57
50-59	8.6	0.37
>60	6.2	0.26
Income ($1,000):		
<10	4.9	0.20
10-20	15.6	0.66
20-30	20.8	0.89
30-40	20.3	0.87
40-50	14.5	0.62
50-75	17.9	0.76
>75	6.0	0.26
Region:		
North East	15.7	0.67
North Central	37.4	1.60
South	23.4	0.99
West	23.5	1.00
Education:		
Non High School Grad.	4.2	0.18
High School	25.9	1.10
Some College	29.6	1.26
College Grad.	40.3	1.72
Occupation:		
Prof./Managerial	47.6	2.03
Clerical/Sales	16.4	0.70
Blue Collar	26.6	1.13
Other	9.4	0.40

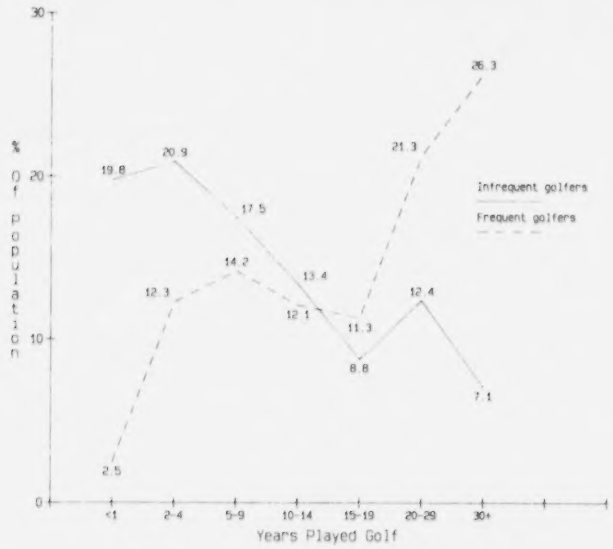
Figure 3.7 **AGE STRUCTURE OF FREQUENT AND INFREQUENT PLAYERS**



A player with more golf experience is more likely to be a frequent player. This relationship is presented in Figure 3.8. Fifty-eight point nine percent of frequent players have played for more than 14 years, whereas only 28.3 percent of infrequent players have played for 14 years.

Figure 3.8

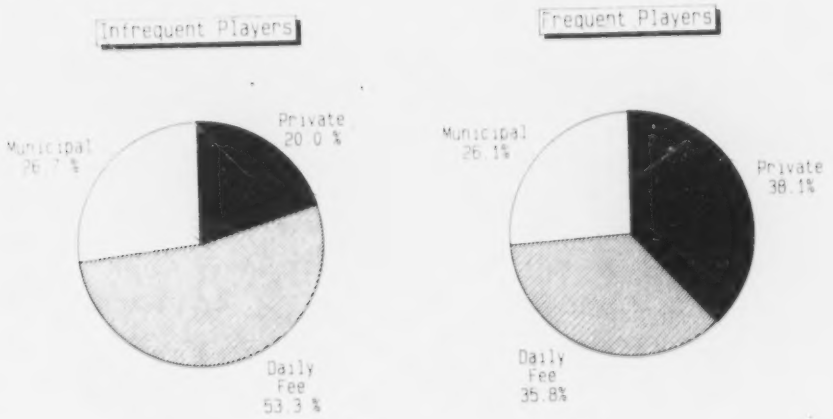
COMPARISON OF GOLF EXPERIENCE OF FREQUENT AND INFREQUENT PLAYERS



Frequent players are more likely to be private golfers. Figure 3.9 shows 38.1 percent of frequent players to be private golfers compared with only 20 percent of infrequent players.

Figure 3.9

FACILITIES USED BY FREQUENT AND INFREQUENT PLAYERS



Chapter 4

Public and Private Golfers

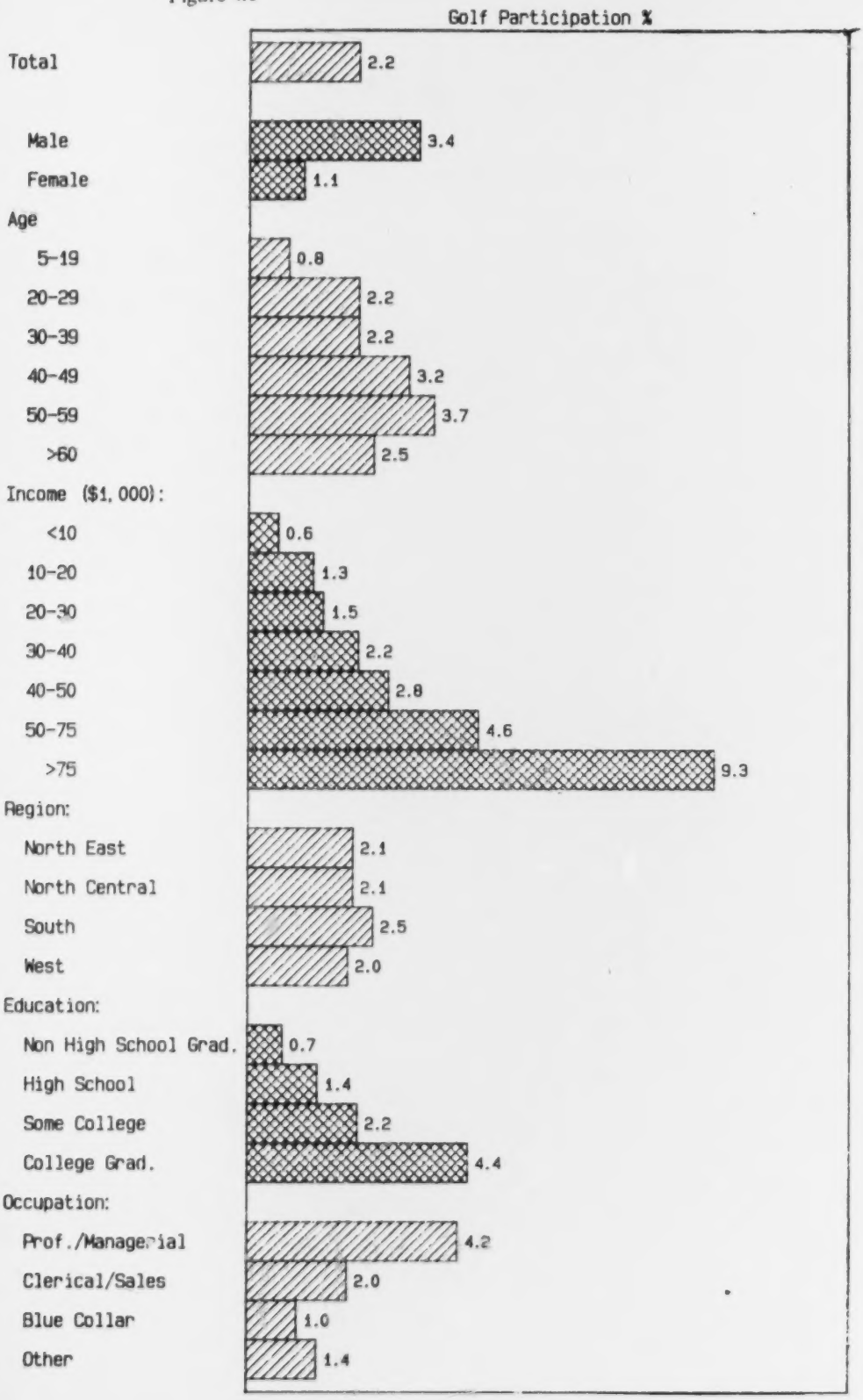
Seventy-seven percent of golfers, 15.58 million players, visit public golf facilities for at least 50 percent of their golf rounds. The remainder of the golfing population, 4.62 million players, are defined as private golfers, playing at least 50 percent of their golf on private facilities. Figures 4.1 and 4.2 present demographic profiles of the private and public golfing populations. Female golfers are more likely to be private players. Twenty-six point two percent of females are private golfers, while 23.7 percent of males are private golfers. Private golfers also tend to be older players. Twenty-six point eight percent of public golfers are over 50 years old, while 37.1 percent of private golfers are over 50. The mean age of the private golfer is 42.7 years, while the public golfer's mean age is 38.4 years. Not surprisingly private golfers tend to have a higher household income, private golf being a more expensive version of the sport than public golf. The mean household income of the public golfer is $39,400 annually, whereas the mean income of the private golfer is $47,900.

On a regional basis private golf is strongest in the South, while public golf is more dominant in the North Central region. This regional pattern in part reflects the supply of public and private facilities. There is a good supply of public golf in the North Central region, but private facilities dominate in the South.

Private golfers tend to be more frequent players than their public counterparts. The mean play frequency of the private golfer is 28.1 rounds annually, while the public golfer's mean frequency is 17.6 rounds annually. Figure 4.3 compares the play frequency of public and private players. Private golfers dominate the frequent player population, 30.7 percent playing 25 rounds or more a year. Only 21.8 percent of public golfers fall in this category. Public golfers tend to dominate the middle frequency ranges.

Demographic Profile Of Private Golfers

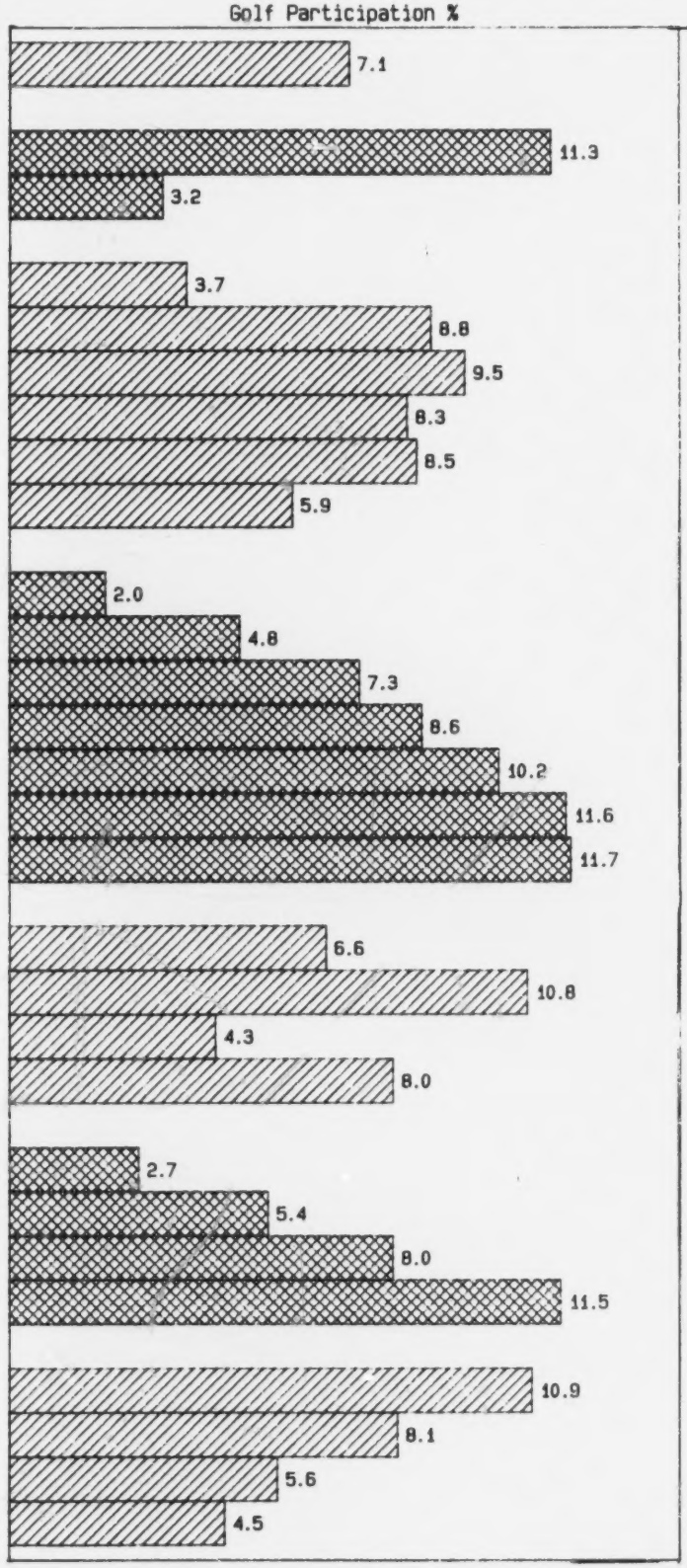
Figure 4.1



	% of Golfer Population	Population (millions)
Total	100.0	4.62
Male	74.3	3.43
Female	25.7	1.18
Age		
5-19	8.8	0.41
20-29	18.9	0.87
30-39	17.9	0.83
40-49	17.3	0.80
50-59	16.5	0.76
>60	20.6	0.95
Income ($1,000):		
<10	4.3	0.20
10-20	12.7	0.59
20-30	13.2	0.60
30-40	16.3	0.75
40-50	15.1	0.70
50-75	22.9	1.06
>75	15.5	0.72
Region:		
North East	20.6	0.95
North Central	23.6	1.09
South	38.5	1.78
West	17.3	0.80
Education:		
Non High School Grad.	4.8	0.22
High School	21.1	0.97
Some College	26.0	1.21
College Grad.	48.1	2.22
Occupation:		
Prof./Managerial	62.4	2.89
Clerical/Sales	14.6	0.67
Blue Collar	15.4	0.71
Other	7.6	0.35

Demographic Profile Of Public Golfers

Figure 4.2



	% of Golfer Population	Population (millions)
Total	100.0	15.58
Male	76.8	11.96
Female	23.2	3.61
Age		
5-19	12.2	1.90
20-29	23.7	3.69
30-39	23.5	3.66
40-49	13.8	2.15
50-59	11.7	1.82
>60	15.1	2.35
Income ($1,000):		
<10	4.5	0.70
10-20	14.3	2.22
20-30	20.5	3.20
30-40	19.7	3.07
40-50	17.2	2.68
50-75	17.2	2.76
>75	6.1	0.95
Region:		
North East	20.1	3.13
North Central	37.7	5.87
South	20.7	3.23
West	21.5	3.35
Education:		
Non High School Grad.	6.0	0.94
High School	26.3	4.09
Some College	28.8	4.49
College Grad.	38.9	6.06
Occupation:		
Prof./Managerial	49.0	7.63
Clerical/Sales	18.2	2.84
Blue Collar	25.4	3.96
Other	7.4	1.15

Figure 4.3 **COMPARISON OF PLAY FREQUENCY**

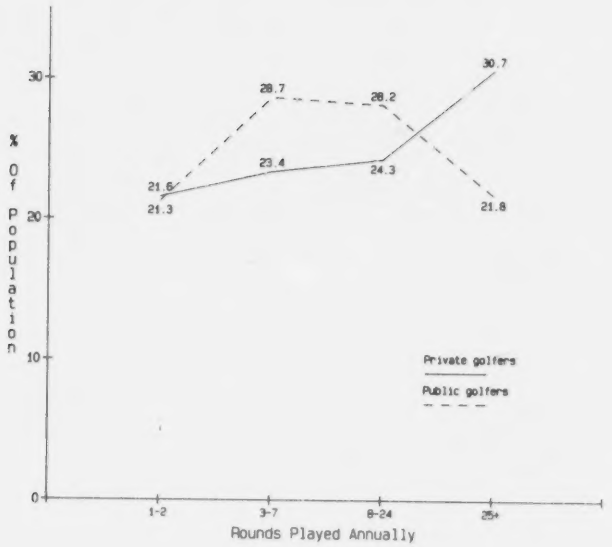


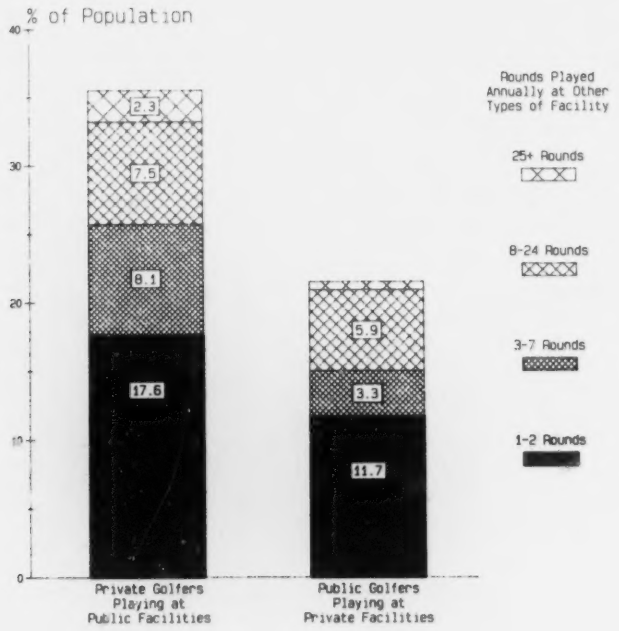
Figure 4.4 shows the total rounds played in 1986 on the different types of facilities: private, daily fee and municipal. The figure shows that 66 percent of all rounds were played on public courses. Therefore, the 77 percent of public players played 66 percent of all golf rounds. The difference in proportions is easily explained by the fact that public golfers are less frequent participants than private golfers.

Figure 4.4

	Number of Rounds Played in 1986 (millions)	**Percent Share of Rounds**
Private	141.9	33.7
Daily Fee	164.7	39.1
Municipal	114.6	27.2
	421.2	100.0

The public/private player classification is not mutually exclusive. Many private players visit public facilities a few times each year and vice versa for public golfers. Figure 4.5 shows that 35.5 percent of golfers defined as private players played at least one round on a public course in 1986. In a similar fashion, 21.5 percent of public players played at least one round on a private course in 1986. Basically, use of other types of facilities is limited to infrequent play. For example, only 0.6 percent of players defined as public players played more than 25 rounds on private courses in 1986.

Figure 4.5 **PUBLIC AND PRIVATE GOLFERS VISITING OTHER TYPES OF FACILITIES**



A comparison of the age at which public versus private players took up the game is presented in Figure 4.6. Public golfers have an increased tendency to take up the game as teenagers and as seniors, while private golfers are more likely to have taken up the game in their middle years. Private golfers are more likely to have played golf for a longer period of time. Figure 4.7 compares the length of golf

experience of private versus public players. The figure shows that 52.2 percent of private players have played for over 15 years, while only 38.3 percent of public players have played for over 15 years.

Figure 4.6 **AGE STARTED GOLF**

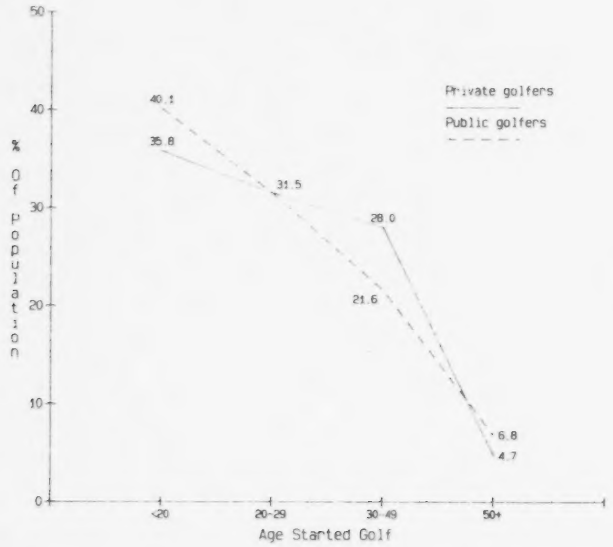
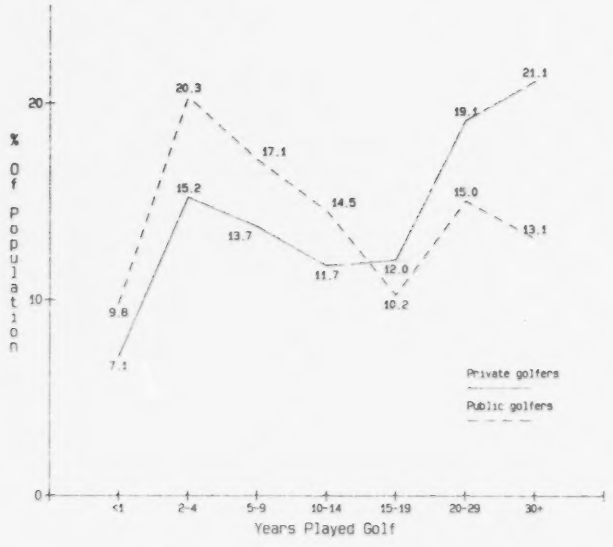


Figure 4.7 **LENGTH OF GOLF EXPERIENCE**



Chapter 5

Junior and Senior Golfers

The 2.32 million junior golfers, players less than 20 years old, comprise 11.5 percent of the golfing population. The 3.33 million senior golfers, players over the age of 60, comprise 16.5 percent of the golfing population.

Various definitions of senior player are used. Some people define seniors as over 65, some as over 60 and sometimes senior is defined as being over 50. This chapter defines the senior player as one over 60 years. Separate profiles of senior golfers defined by alternative definitions, over 50 and over 65, are provided in the appendix.

Senior players are much more frequent participants than the junior players. Figure 5.1 highlights the relative importance of the junior and senior golfing populations in terms of rounds played. The figure shows that senior golfers comprise 16.4 percent of the golfing population, but due to their high play frequency, account for 33 percent of rounds played. Junior golfers, comprising 11.5 percent of the population with less frequent playing habits, account for only 6.6 percent of rounds played.

Figures 5.2 and 5.3 provide demographic profiles of the junior and senior golfing populations. Males dominate both the junior and senior golfing populations. Male domination is strongest among the juniors where 86 percent of the players are male, whereas only 71 percent of senior players are male.

It has been established that overall golf participation is strongly related to higher levels of income. Examining the income distribution of the junior and senior golfing populations, it is apparent that junior participation is strongly related to household income, whereas senior participation is almost unaffected by income

Figure 5.1 **ROUNDS PLAYED BY JUNIOR AND SENIOR PLAYERS**

levels. Thirty-two point one percent of juniors come from households of over $50,000 annual income, yet only 17.2 percent of seniors come from $50,000+ households. The mean household income of the junior golfer population is $43,200 compared to $40,100 for senior golfers.

The phenomena of junior golf participation being very related to household income makes sense when viewed in terms of a junior player needing relatively wealthy parents to pay for golfing activity. On the other hand, senior golfers' household income is not as related to their golfing activity as is the junior golfer's because senior retirement income may not fully reflect actual affluence.

There is a positive correlation of higher education levels with higher golf participation rates in both the senior and junior golfing populations. However, as with income, the relationship is much stronger with the junior golfers than with the seniors. Sixty-seven point seven percent of junior players come from households whose head has some college education. Only 57.2 percent of seniors come from such households.

Figure 5.2 **SENIOR GOLFERS**

	Percent of Senior Golfing Population	Number of Senior Golfers (millions)
Total	100	3.33
Male	71	2.37
Female	29	0.97
Income ($1,000):		
<10	7.6	0.25
10-20	24.8	0.83
20-30	22.1	0.74
30-40	17.3	0.58
40-50	11.0	0.37
50-75	11.6	0.39
>75	5.6	0.19
Region:		
North East	21.9	0.73
North Central	30.8	1.03
South	28.0	0.93
West	19.3	0.64
Education:		
Non High School	12.1	0.40
High School Grad	30.7	1.02
Some College	25.8	0.86
College Grad	31.4	1.05
Occupation:		
Prof/Managerial	51.6	1.72
Clerical/Sales	24.0	0.8
Blue Collar	20.0	0.67
Other	4.4	0.15

Figure 5.3 **JUNIOR GOLFERS**

	Percent of Junior Golfing Population	Number of Junior Golfers (millions)
Total	100	2.32
Male	86	1.99
Female	14	0.33
Income ($1,000):		
<10	4.3	0.13
10-20	9.8	0.23
20-30	18.0	0.42
30-40	18.4	0.43
40-50	17.4	0.40
50-75	25.1	0.58
>75	7.0	0.16
Region:		
North East	21.4	0.5
North Central	37.9	0.88
South	23.6	0.55
West	17.1	0.4
Education:		
Non High School	5.2	0.12
High School Grad	27.1	0.63
Some College	27.0	0.63
College Grad	40.7	0.95
Occupation:		
Prof/Managerial	52.2	1.21
Clerical/Sales	14.1	0.33
Blue Collar	26.3	0.61
Other	7.4	0.17

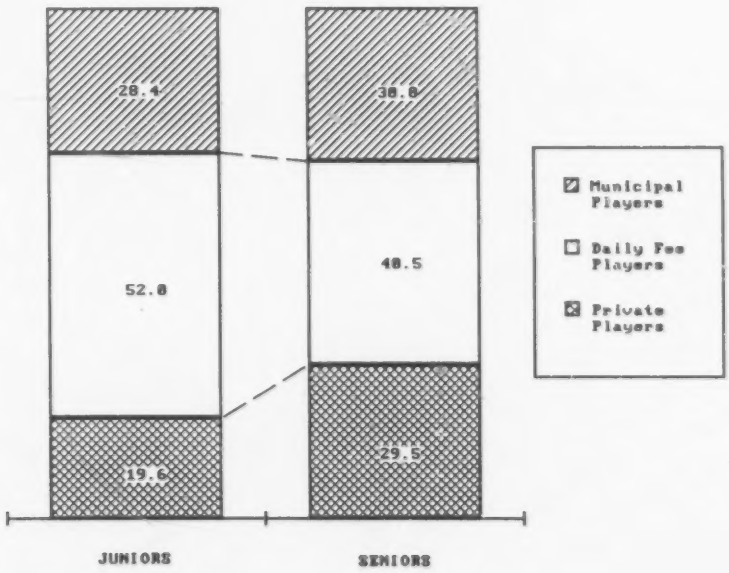
Figure 5.4 outlines play frequency by age group and shows that on the average, juniors play 11.6 rounds annually, whereas seniors play 40.7 rounds. The figure clearly shows average play frequency to consistently rise with age.

Figure 5.4 **PLAY FREQUENCY AND AGE**

Age	Percent of Golfers	Golfers (millions)	Average Play Frequency	Percent of Rounds
< 20	11.5	2.32	11.6	6.6
20-30	22.7	4.58	12.1	13.6
30-40	22.1	4.46	13.9	15.2
40-50	14.6	2.95	20.5	14.8
50-60	12.7	2.56	26.7	16.8
60+	16.4	3.33	40.7	33.0
Total	**100.0**	**20.20**		**100.0**

Senior players are far more likely to be private golfers than juniors, as shown by Figure 5.5. Nineteen point six percent of juniors are private players, whereas 29 percent of seniors are private players.

Figure 5.5 **TYPE OF FACILITY USED BY JUNIOR AND SENIOR GOLFERS**



Chapter 6

Male and Female Golfers

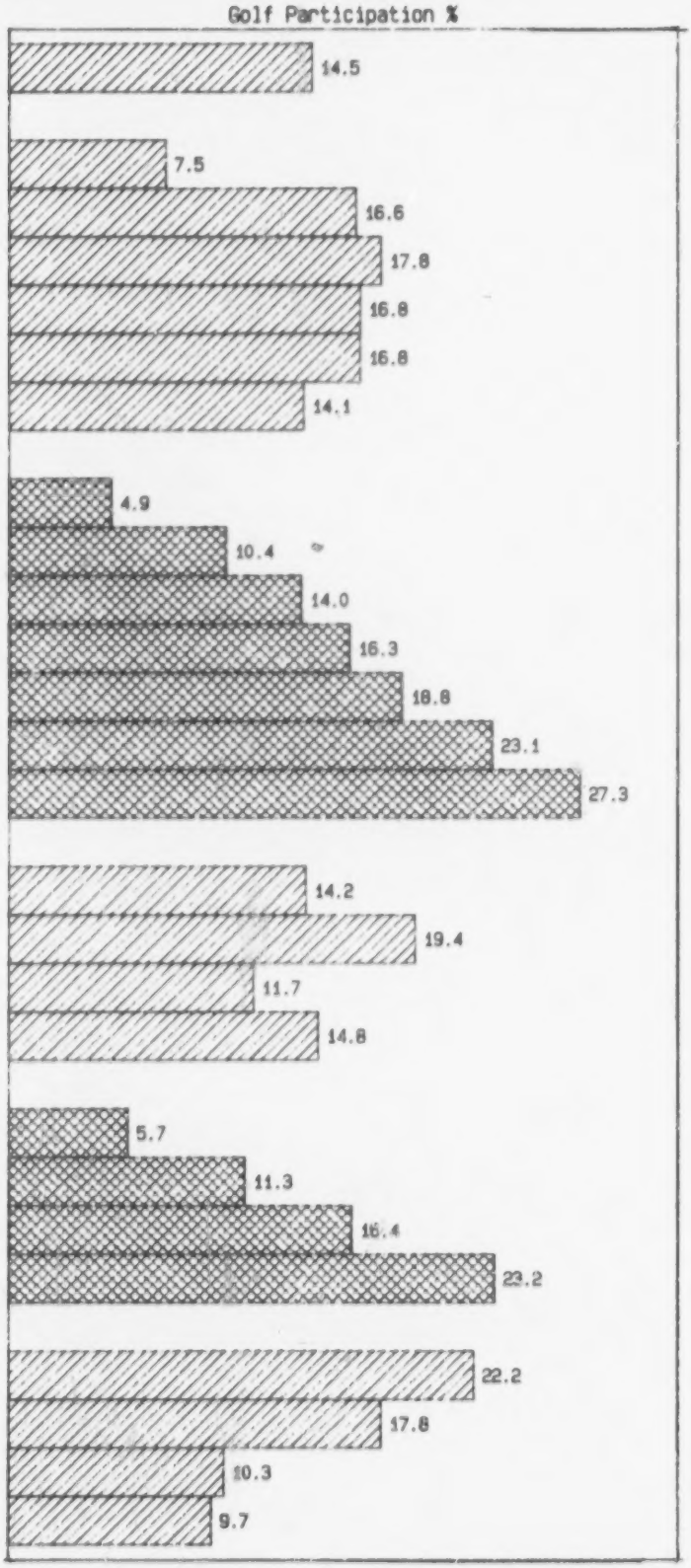
Golf continues to be a male dominated sport with 76.1 percent of the participants male. In 1986, 14.5 percent of U.S. males played golf, whereas only 4.2 percent of females played. Figures 6.1 and 6.2 provide demographic profiles of the male and female golfing populations. Comparison of the age structure of the male and female golfing populations shows female players on the average to be older. The average age of male golfers is 38.4 years, while the average age of females is 42.5 years. The highest male participation rates, 17.8 percent of the population, occur in the 30-40 year old age bracket, whereas the highest female participation rates, 7.3 percent of the population, occur in the 50-60 year old age bracket.

In terms of household income, the male and female golfing population display very similar income distributions. As with the golf population in general, both male and female player participation rates are strongly correlated with the higher income brackets. The mean income of both the male and female golfing populations is exactly the same at $41,000 annually.

On a regional basis, male and female golf participation shows some interesting patterns. Female golf participation is most predominant in the North Central region and least predominant in the Southern region. The Southern region is home to 26.6 percent of male golfers but only 19.4 percent of the female golfing population. In contrast, the North Central region is home to 33.2 percent of the male golfing population but 39.0 percent of the female golfing population.

Demographic Profile Of Male Golfers

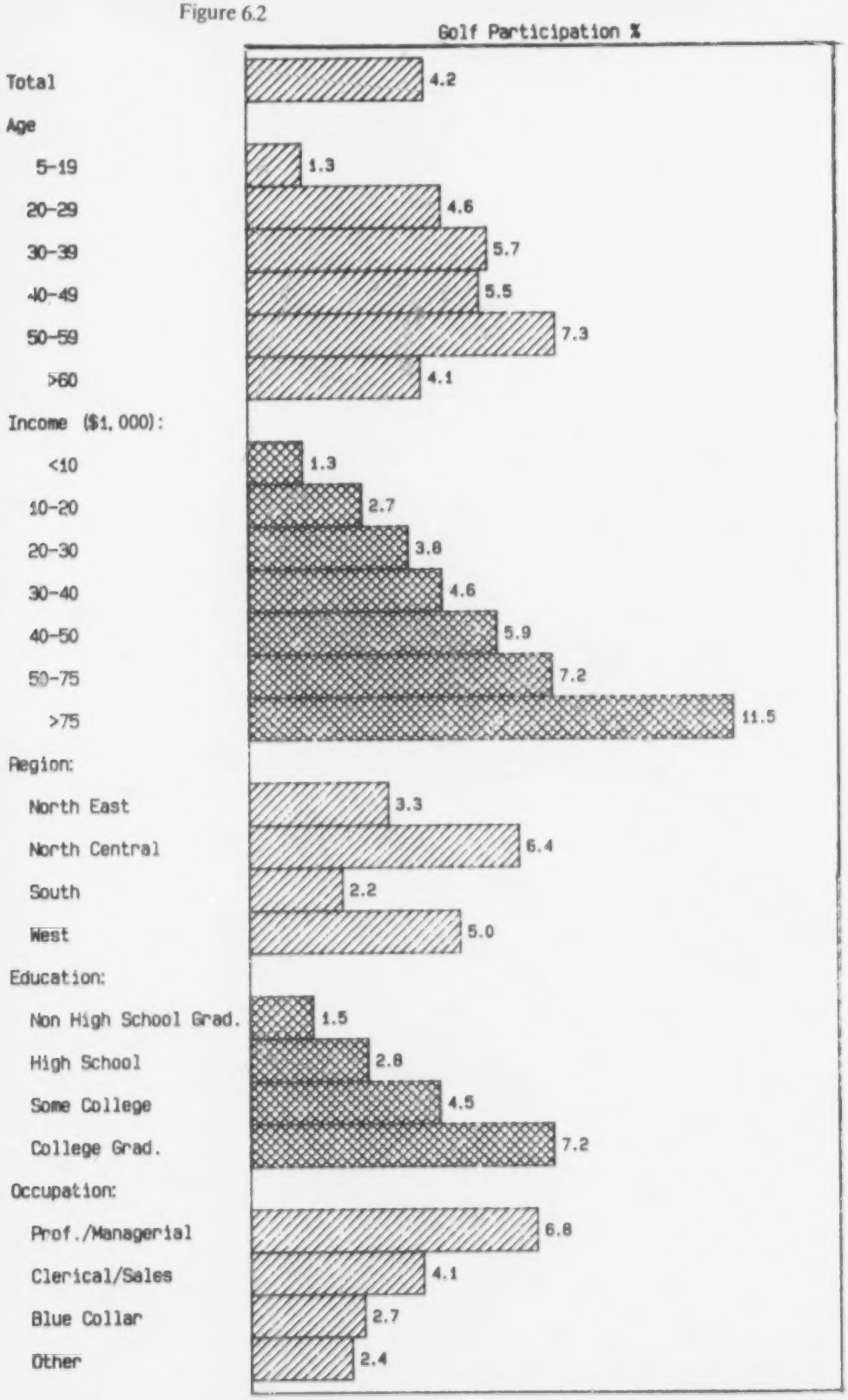
Figure 6.1



	% of Golfer Population	Population (millions)
Total	100.0	15.37
Age		
5-19	12.4	1.91
20-29	26.5	4.07
30-39	22.4	3.44
40-49	13.3	2.04
50-59	10.9	1.68
>60	14.5	2.23
Income ($1,000):		
<10	4.2	0.65
10-20	14.2	2.18
20-30	19.5	2.99
30-40	19.0	2.92
40-50	16.6	2.55
50-75	18.8	2.90
>75	7.7	1.18
Region:		
North East	20.7	3.18
North Central	33.2	5.10
South	26.6	4.09
West	19.5	3.00
Education:		
Non High School Grad.	5.8	0.89
High School	25.4	3.90
Some College	28.3	4.35
College Grad.	40.5	6.23
Occupation:		
Prof./Managerial	50.8	7.81
Clerical/Sales	17.7	2.72
Blue Collar	23.8	3.66
Other	7.7	1.18

Demographic Profile Of Female Golfers

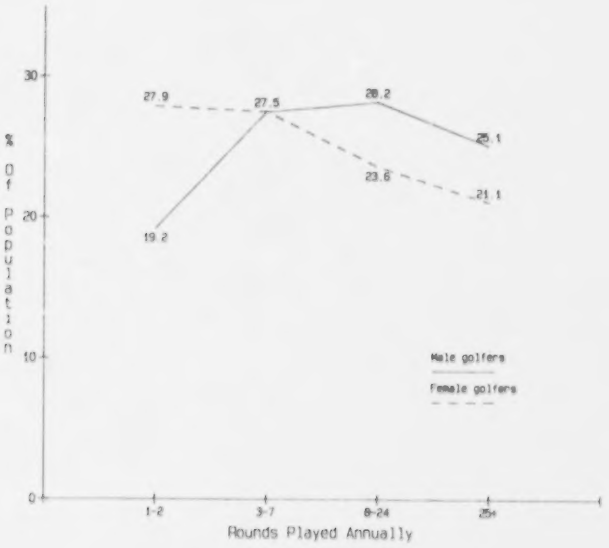
Figure 6.2



	% of Golfer Population	Population (millions)
Total	100.0	4.82
Age		
5-19	7.1	0.34
20-29	21.2	1.02
30-39	20.8	1.00
40-49	15.2	0.73
50-59	15.9	0.77
>60	19.8	0.96
Income ($1,000):		
<10	6.1	0.30
10-20	15.1	0.73
20-30	18.2	0.87
30-40	17.5	0.84
40-50	16.1	0.77
50-75	17.6	0.85
>75	9.4	0.45
Region:		
North East	18.2	0.88
North Central	39.0	1.88
South	19.4	0.94
West	23.4	1.13
Education:		
Non High School Grad.	6.4	0.31
High School	24.4	1.17
Some College	29.1	1.40
College Grad.	40.1	1.94
Occupation:		
Prof./Managerial	53.0	2.56
Clerical/Sales	18.2	0.88
Blue Collar	21.3	1.02
Other	7.5	0.36

Male golfers tend to be far more frequent golf participants than their female counterparts. The average play frequency of the male golfer is 21.3 rounds annually, whereas the average play frequency of the female golfer is 16.9 rounds annually. Figure 6.3 compares the play frequency distribution of the male and female golfing populations. Twenty-seven point nine percent of female players are very infrequent players, playing less than three rounds annually, whereas only 19.2 percent of male golfers fall in this category. Fifty-three point three percent of males play more than seven rounds annually, while only 44.7 percent of females play more than seven rounds.

Figure 6.3 **PLAY FREQUENCY OF MALE AND FEMALE GOLFERS**



Male golfers tend to take up the game at a younger age than female golfers. The average age for a male player to take up the game is 23.4 years, while the average age for a female player to take up the game is 31.1 years. Figure 6.4 compares the age that male and female players take up golf. The figure shows that 45 percent of males start playing golf as teenagers, whereas only 20.5 percent of female golfers take up the game as teenagers. Women show a greater tendency to take up golf in their middle years. For example, 22.2 percent of female players take up the game between the ages of 30-40, while only 13.5 percent of male players take up the

game in this age bracket. One result of the male golfer's tendency to take up the game at a younger age is that the male golfing population on the average has played golf for longer than the female golfing population.

Figure 6.4 **AGE OF STARTING GOLF FOR MALE AND FEMALE PLAYERS**

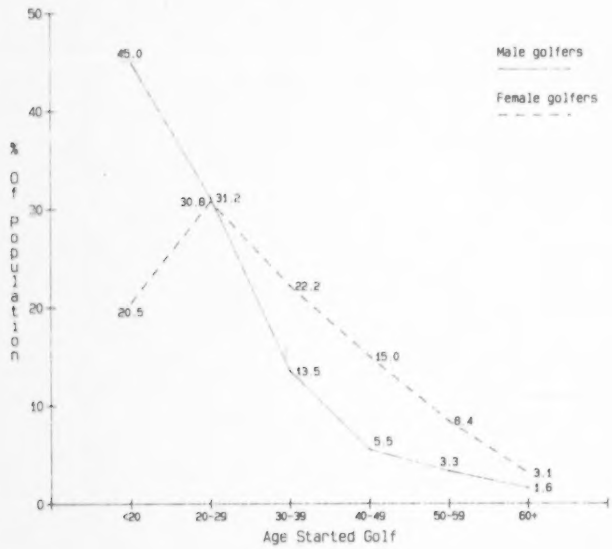
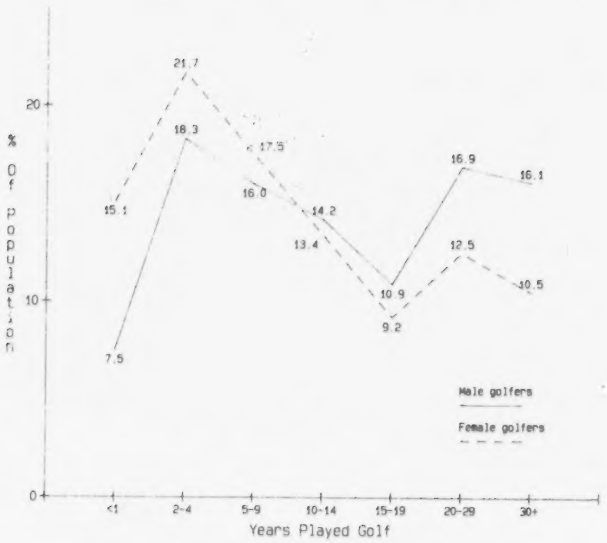


Figure 6.5 contrasts the length of golf experience of male and female golfers. The figure shows that 15.1 percent of female golfers have played golf for one year or less while only 7.5 percent of male golfers have played for a year or less. At the other end of the scale, 58.1 percent of the male players have played for over 10 years, while 45.6 percent of the female players have played for over 10 years.

Figure 6.5

LENGTH OF GOLF EXPERIENCE OF MALE AND FEMALE PLAYERS



Chapter 7

Regional Variations in Golf Participation

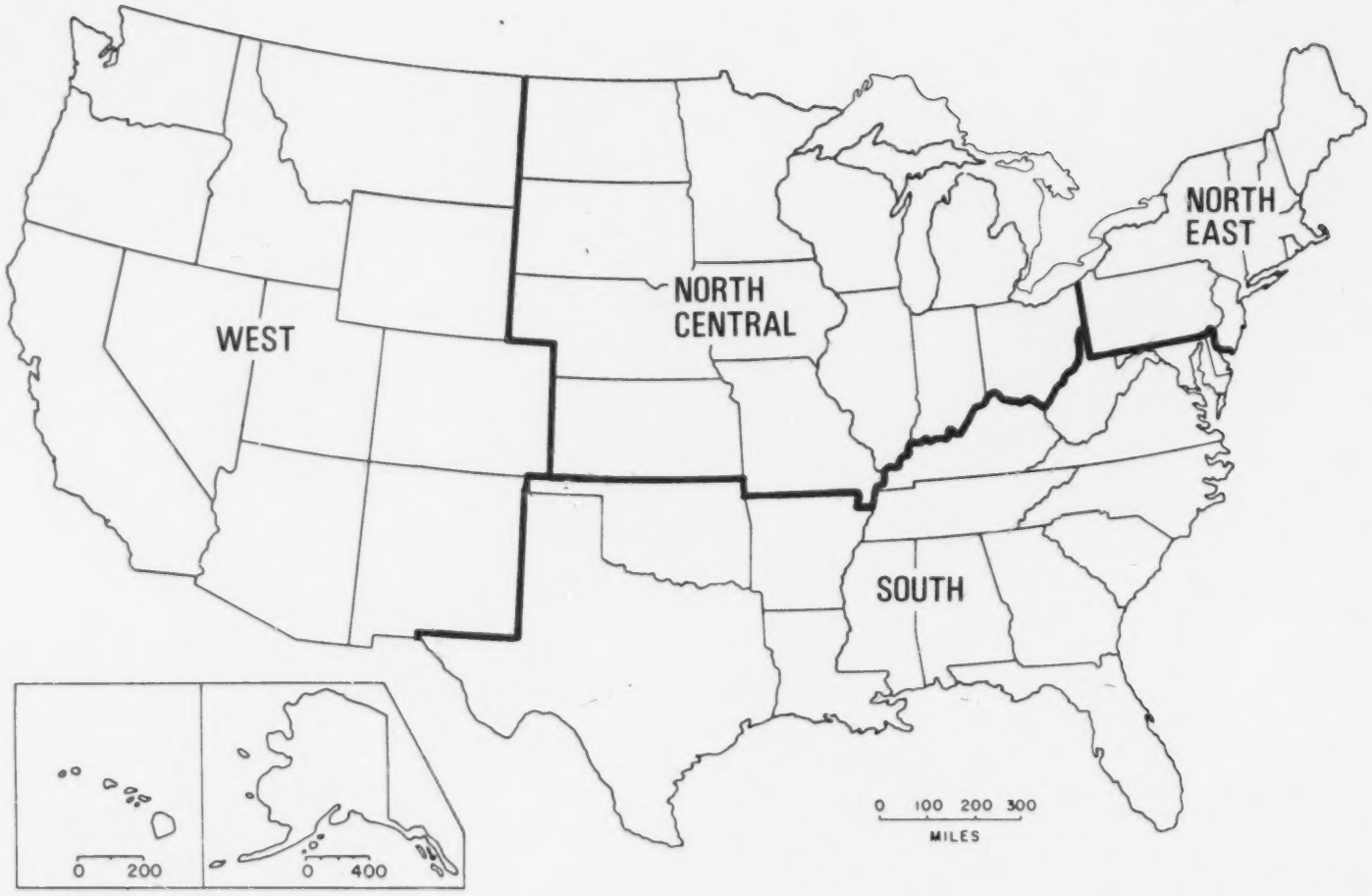
There are large regional variations in the nature of golf participation. For example, 14.6 percent of the people in Wisconsin play golf, but only 3.4 percent of the population in Louisiana play golf. Not only does the overall golf participation rate vary dramatically around the country, the demographics of the golfing population also varies considerably from region to region. For example, 36.5 percent of the golf population in Idaho is female, and only 11.3 percent in South Carolina are female.

Figures 7.2 through 7.5 present demographic profiles of regional golf populations. A map defining the regions is shown in Figure 7.1. As can be seen, female involvement in golf varies considerably by region. In the South, 17.4 percent of golfers are female, while females account for 25.8 percent of golfers in the West.

Regional golf populations also show marked differences in their age structures. Fourteen point nine percent of the golf population in the West are seniors whereas 17.7 percent of the golf population in the South are seniors. Junior golfers comprise 12.3 percent of the population in the North Central region, but only 9.5 percent of the golf population in the South. In terms of income, the western golf population is the wealthiest, with a mean household income of $47,500 annually, while the golf population in the North Central region, with a mean income of $38,200, is the least wealthy (Figure 7.6).

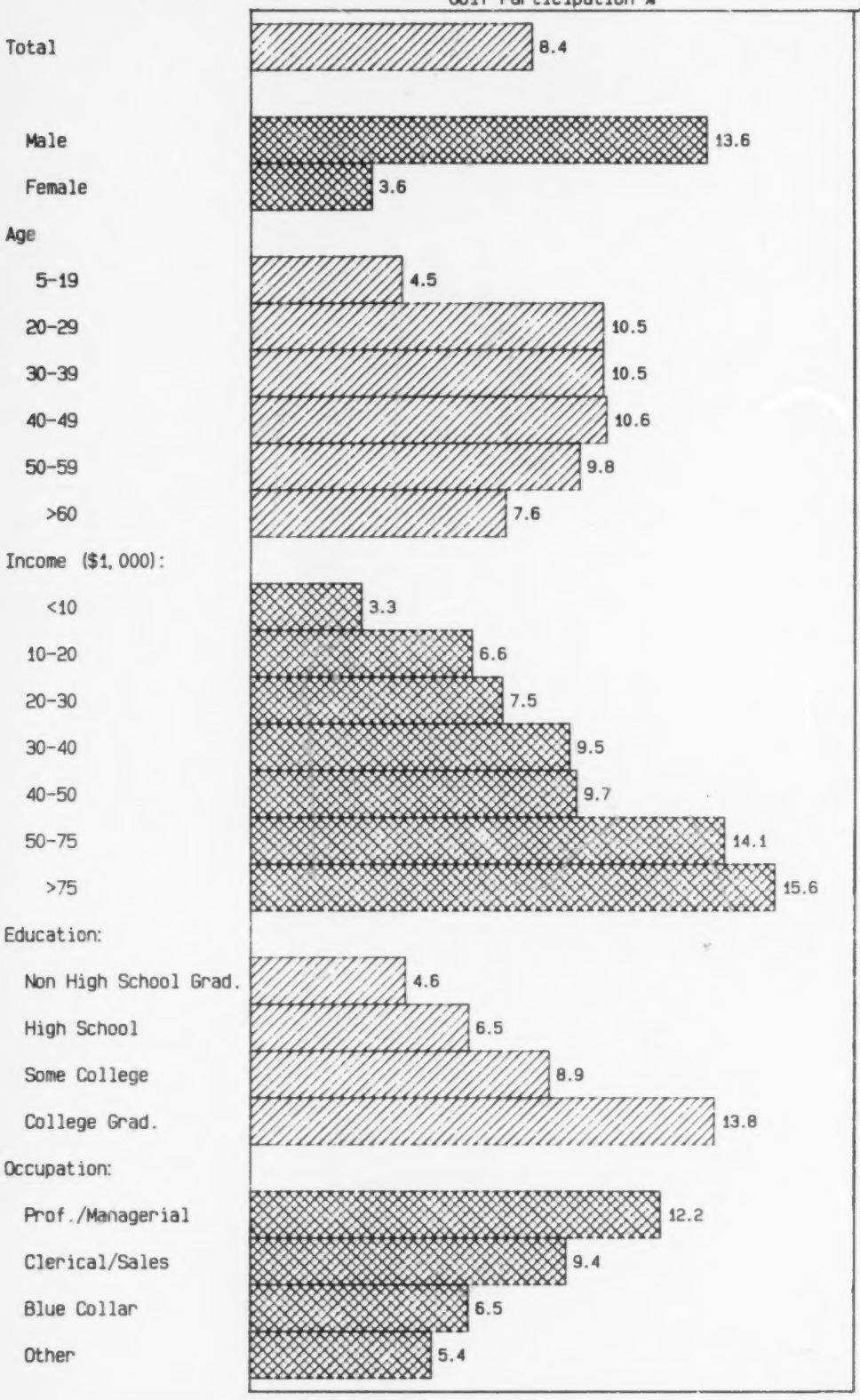
Figure 7.1

DEFINITION OF REGIONS



Demographic Profile Of North Eastern Golfers

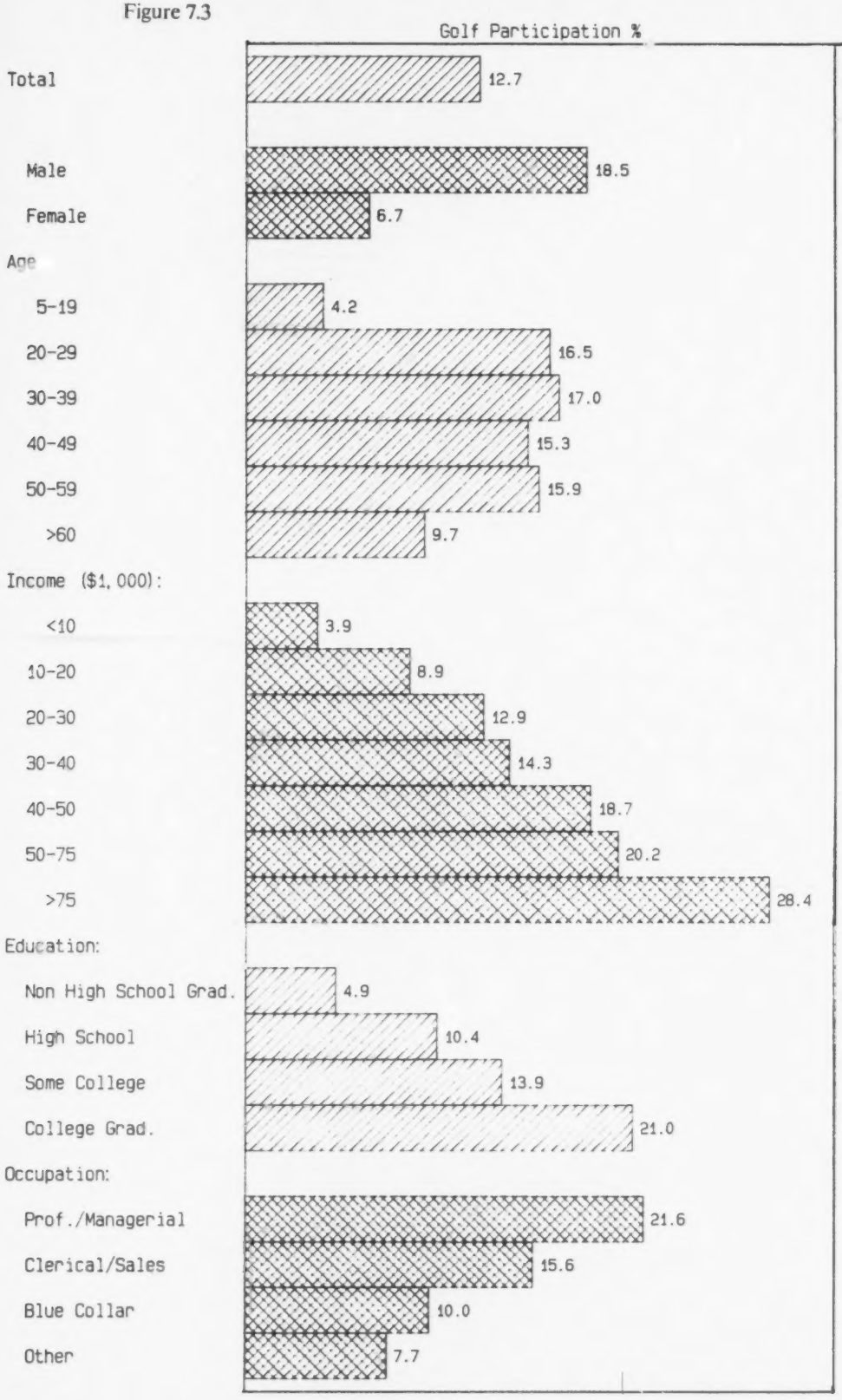
Figure 7.2



	% of Golfer Population	Population (millions)
Total	100.0	4.03
Male	79.7	3.21
Female	20.3	0.82
Age		
5-19	12.0	0.48
20-29	23.1	0.93
30-39	20.4	0.82
40-49	15.1	0.61
50-59	12.4	0.50
>60	17.0	0.69
Income ($1,000):		
<10	6.0	0.24
10-20	14.9	0.60
20-30	16.0	0.65
30-40	18.8	0.76
40-50	15.2	0.61
50-75	20.5	0.83
>75	8.6	0.30
Education:		
Non High School Grad.	7.9	0.32
High School	27.5	1.11
Some College	25.5	1.02
College Grad.	39.1	1.58
Occupation:		
Prof./Managerial	49.7	2.00
Clerical/Sales	19.3	0.78
Blue Collar	24.1	0.97
Other	6.9	0.28

Demographic Profile Of North Central Golfers

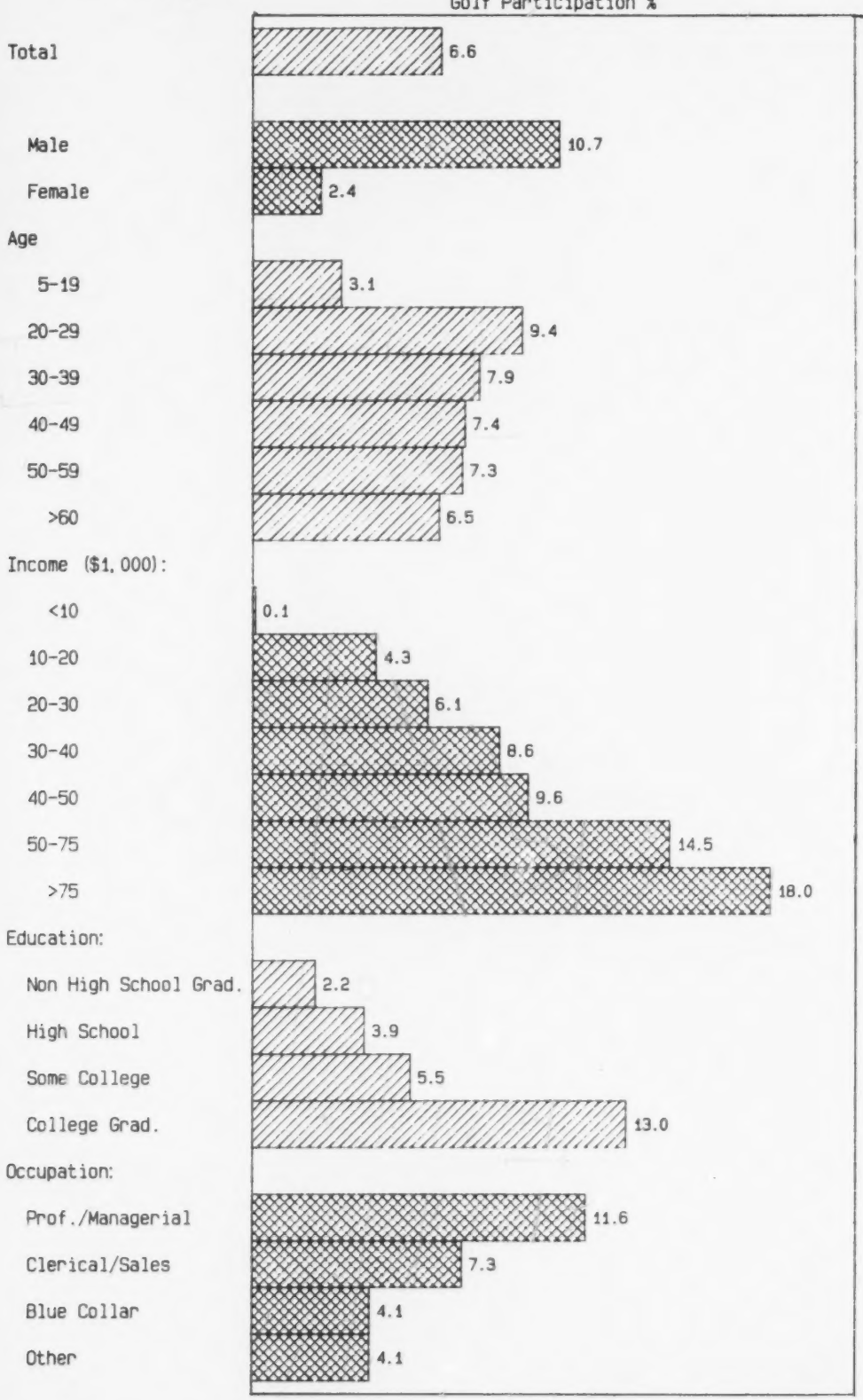
Figure 7.3



	% of Golfer Population	Population (millions)
Total	100.0	7.17
Male	74.6	5.34
Female	25.4	1.82
Age		
5-19	12.3	0.88
20-29	24.4	1.75
30-39	23.8	1.71
40-49	13.9	1.00
50-59	11 6	0.83
>60	14 0	1.00
Income ($1,000):		
<10	4.8	0.30
10-20	14.4	1.03
20-30	22.5	1.61
30-40	19.1	1.37
40-50	18.5	1.33
50-75	15.1	1.08
>75	5.6	0.40
Education:		
Non High School Grad.	5.5	0.40
High School	31.3	2.24
Some College	27.3	1.96
College Grad.	35.9	2.57
Occupation:		
Prof./Managerial	48.6	3.48
Clerical/Sales	17.5	1.26
Blue Collar	26.3	1.89
Other	7.6	0.55

Demographic Profile Of Southern Golfers

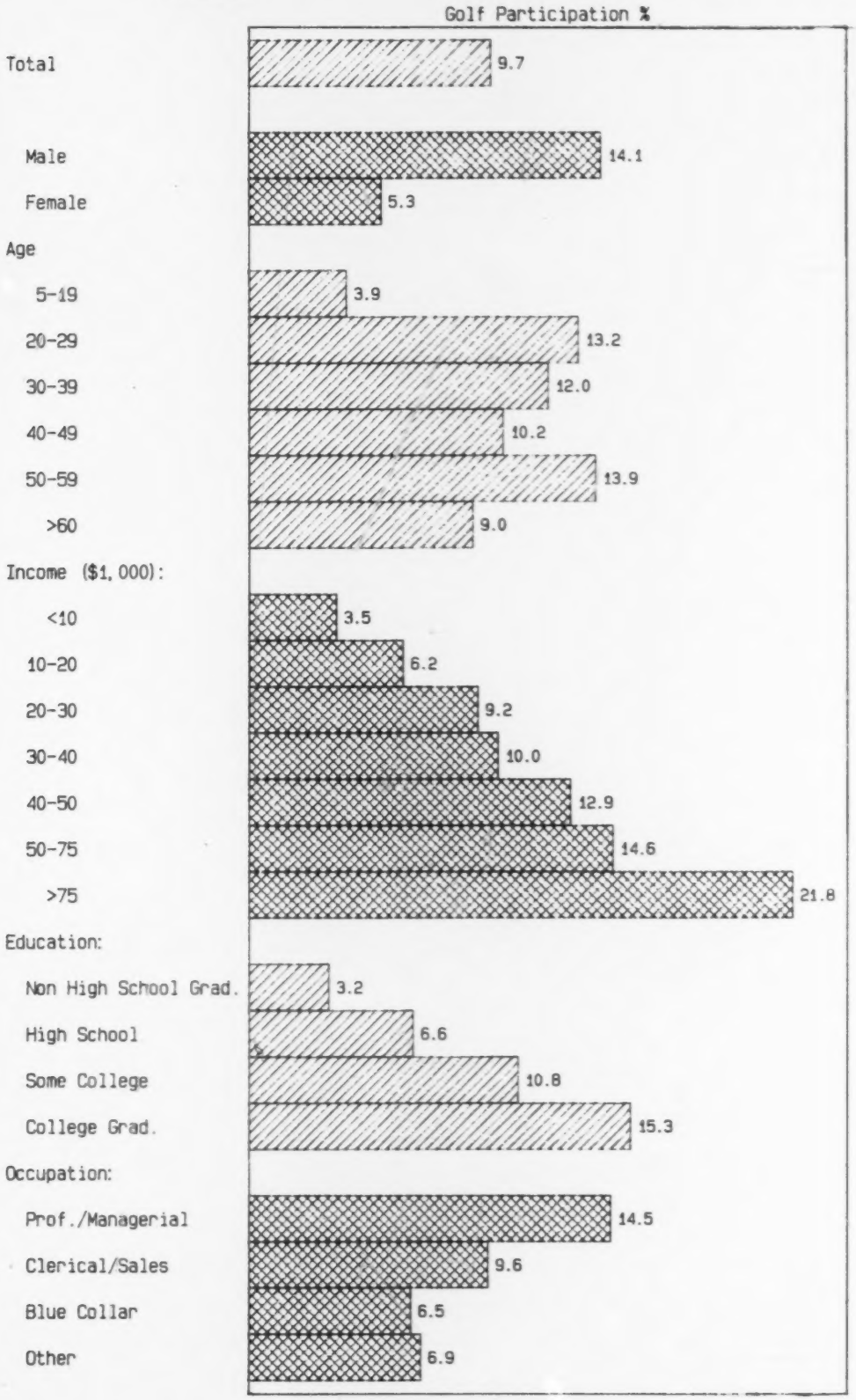
Figure 7.4



	% of Golfer Population	Population (millions)
Total	100.0	4.92
Male	82.6	4.06
Female	17.4	0.85
Age		
5-19	10.6	0.52
20-29	27.8	1.37
30-39	20.9	1.03
40-49	12.9	0.64
50-59	10.1	0.49
>60	17.7	0.87
Income ($1,000):		
<10	3.3	0.16
10-20	15.5	0.76
20-30	17.3	0.85
30-40	19.1	0.95
40-50	15.4	0.76
50-75	21.0	1.03
>75	8.4	0.41
Education:		
Non High School Grad.	6.3	0.31
High School	19.5	0.96
Some College	27.1	1.33
College Grad.	47.1	2.32
Occupation:		
Prof./Managerial	54.5	2.68
Clerical/Sales	18.0	0.87
Blue Collar	20.6	1.01
Other	6.9	0.34

Demographic Profile Of Western Golfers

Figure 7.5



	% of Golfer Population	Population (millions)
Total	100.0	4.16
Male	74.2	3.08
Female	25.8	1.07
Age		
5-19	9.5	0.40
20-29	25.4	1.06
30-39	22.5	0.94
40-49	12.9	0.54
50-59	14.8	0.62
>60	14.9	0.62
Income ($1,000):		
<10	4.6	0.19
10-20	12.6	0.52
20-30	19.2	0.80
30-40	17.3	0.72
40-50	15.6	0.65
50-75	19.4	0.81
>75	11.3	0.47
Education:		
Non High School Grad.	4.1	0.17
High School	19.7	0.82
Some College	35.0	1.46
College Grad.	41.2	1.71
Occupation:		
Prof./Managerial	53.9	2.24
Clerical/Sales	16.8	0.70
Blue Collar	20.0	0.83
Other	9.3	0.39

Figure 7.6 **COMPARISON OF REGIONS**

		North East	North Central	Southern	Western
Play Frequency	1-2	16.8	23.0	20.2	24.4
Rounds 1986	3-7	31.8	26.5	25.9	27.8
(Percent of Population)	8-24	28.7	28.3	25.7	26.3
	25+	22.7	22.3	28.2	21.5
Mean 1986 Play Frequency (Rounds)		18.2	17.0	26.9	18.3
Mean Household Income ($ thousands)		41.4	38.2	42.1	47.5
Percent of Golf Population from $50,000+ Households		29.1	20.7	29.4	30.7
Mean Age (Years)		39.2	37.9	38.9	37.3

Examination of the educational attainment of the golf population shows 47.1 percent of golfers in the South are college graduates while only 35.9 percent of golfers in the North Central region are college graduates. Comparing occupational structures by region, 54.5 percent of golfers in the West come from professional households, while 48.6 percent of golfers in the North Central region are from professional households. An overview of regional demographics shows the North Central region, with its very high participation rates of around 14 percent, to be more like the U.S. population in general and less like the overall golf population with its characteristic elitism.

Comparison of the play frequency distribution of golfers from region to region reveals that Southern golfers are the most frequent players playing on the average 26.9 rounds per year, while those in the North Central region play the least--17 rounds annually. This regional pattern makes sense climatically, bearing in mind four season golf in the South and two season golf in the North.

Geographic variations in the golf population jump out even further if a state by state analysis is used in place of the broad four region analysis. Figure 7.7 outlines

bottom line figures for the demographics of the golfing populations in the 50 states. These figures are derived from a combination of the 1985 and the 1986 participation surveys. The two surveys were combined in order to obtain a larger sample size, thus reducing possible sample error at the state level. The data in Figure 7.7 represents responses from 90 thousand individuals nationally, 34 thousand in 1985 and 56 thousand in 1986.

Figure 7.8* maps golf participation rates by state. The map clearly shows the region of highest golf participation, 10-14 percent, to be northern Great Lakes region. The Southern region with its golf participation rates of three to six percent contrasts strongly with the North. Florida and the Carolinas with their influx of tourists, seasonal residents and retirees form notable exceptions to the low golf participation rates in the South. These visitors are primarily northerners bringing their golfing culture with them.

The proportion of the golf population comprising females is mapped by state in Figure 7.9. The figure shows a clear North/South relationship with female participation being highest in the North and lowest in the South. Figure 7.10 maps private golfers as a percentage of the golfing population. There is a very marked region of private golf in the southern U.S. The map is almost the reverse of the overall golf participation map, areas with low golf participation being strongholds of private golf.

The percentage of the golf population over the age of 50 is mapped in Figure 7.11. No overall regional pattern is apparent. Concentrations of senior golf are scattered around the U.S, but Florida and Arizona, with their large retirement communities of senior golfers, stand out clearly with 47.2 percent and 41.2 percent respectively of their populations being over 50. Of some surprise is the high percentage of the golf population in the Dakotas being over 50. This may be explained by the outward migration of young people from the Dakotas in search of opportunity.

*The maps presented in Figures 7.8 through 7.11 highlighting regional patterns in golf behavior were developed in cooperation with *Sport Place* Magazine, an International Journal of Sports Geography.

Figure 7.7 **STATE PARTICIPATION RATES AND BASIC DEMOGRAPHICS**

	Golf Participation Rate (percentage)	Total Golfers (thousands)	Percentage Golfers Female
Alabama	4.4	173,214	20.6
Arizona	8.4	262,094	28.5
Arkansas	5.0	115,476	23.0
California	8.8	2,271,465	23.2
Colorado	10.3	325,814	21.6
Connecticut	11.3	351,140	18.7
Delaware	6.9	42,018	22.0
D.C.	2.6	15,935	15.1
Florida	8.3	923,594	19.1
Georgia	4.8	280,832	16.0
Idaho	8.7	85,601	36.5
Illinois	10.9	1,230,948	20.7
Indiana	11.6	624,507	20.0
Iowa	14.0	395,293	31.1
Kansas	11.6	278,240	23.6
Kentucky	6.7	244,407	24.1
Louisiana	3.4	149,159	15.0
Maine	7.6	86,609	20.2
Maryland	6.1	262,294	16.6
Massachusetts	9.5	541,491	18.4
Michigan	14.5	1,290,125	25.9
Minnesota	14.5	595,235	29.7
Mississippi	3.9	99,770	20.7
Missouri	7.9	388,959	19.4
Montana	8.5	68,738	27.3
Nebraska	10.1	158,804	28.2
Nevada	7.2	65,979	18.5
New Hampshire	10.7	104,547	22.3
New Jersey	6.7	496,029	13.4
New Mexico	9.0	127,763	26.5
New York	8.4	1,462,446	24.2
North Carolina	8.6	526,649	15.4
North Dakota	10.1	67,734	25.6
Ohio	10.9	1,146,537	21.8
Oklahoma	7.1	229,456	16.4
Oregon	9.7	255,173	28.0
Pennsylvania	8.1	939,959	17.4
Rhode Island	10.1	95,718	6.5
South Carolina	6.1	199,885	11.3
South Dakota	10.0	69,315	28.8
Tennessee	4.8	223,783	12.3
Texas	7.5	1,202,003	18.0
Utah	10.2	164,271	31.3
Vermont	9.1	47,664	19.2
Virginia	5.0	279,317	12.9
Washington	9.9	427,337	23.6
West Virginia	4.9	92,875	23.5
Wisconsin	14.6	682,530	29.0
Wyoming	10.0	49,833	27.1
U.S. Total/Average	**9.1**	**20,218,565**	**23.9**

Figure 7.7

STATE PARTICIPATION RATES & BASIC DEMOGRAPHICS

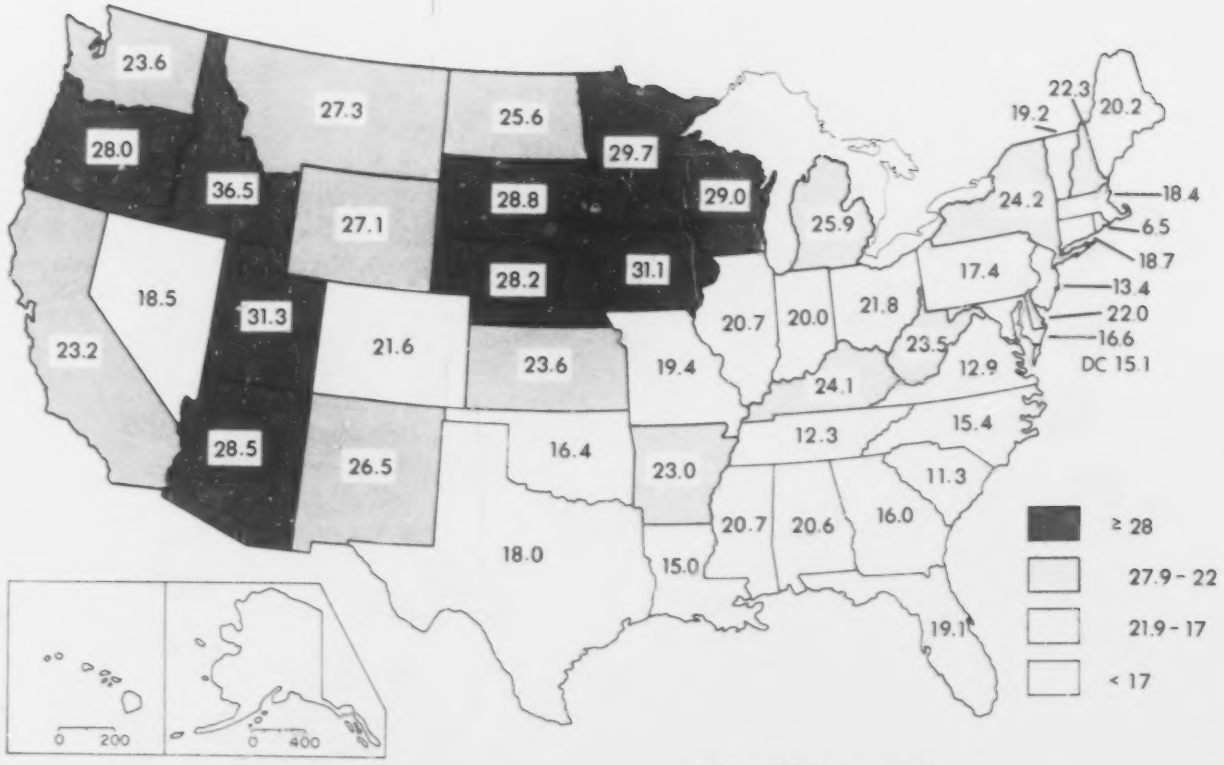
	Percentage of Golfers Private	Percentage of Golfers > 50 yr	Golfer Age	Mean-Golfer HH Income (thousands)	Play Freq. (rounds annually)
Alabama	41.9	29.4	39.2	38.5	24.6
Arizona	24.8	41.2	43.5	40.7	29.3
Arkansas	63.5	40.5	42.4	29.4	32.0
California	20.6	30.7	39.9	46.3	20.9
Colorado	22.0	27.1	36.7	40.3	18.7
Connecticut	29.6	25.5	38.3	57.4	20.3
Delaware	39.5	51.2	44.9	48.0	31.9
D.C.		47.9	46.0	67.1	29.6
Florida	30.7	47.2	47.2	34.7	42.9
Georgia	51.0	24.1	39.6	46.0	22.4
Idaho	14.7	25.0	41.6	33.0	13.8
Illinois	13.1	24.2	37.0	41.3	14.7
Indiana	18.3	23.6	35.8	36.3	16.5
Iowa	28.0	27.5	38.8	36.1	21.5
Kansas	38.1	34.7	41.2	38.9	26.7
Kentucky	24.8	25.9	38.2	37.2	22.3
Louisiana	48.4	18.8	34.1	41.9	26.4
Maine	20.7	41.5	43.4	34.6	19.0
Maryland	46.2	30.9	39.3	52.8	23.0
Massachusetts	21.5	26.3	38.1	42.3	21.0
Michigan	14.9	27.9	39.3	36.3	19.0
Minnesota	17.3	22.4	36.7	36.9	13.5
Mississippi	64.5	25.4	39.0	32.7	29.1
Missouri	25.2	23.8	38.0	40.4	18.6
Montana	12.3	18.8	34.3	30.0	23.6
Nebraska	24.7	20.2	36.6	28.3	14.6
Nevada	14.6	27.1	39.1	47.0	20.9
New Hampshire	16.6	13.1	33.4	40.9	20.9
New Jersey	21.0	25.8	38.6	47.0	12.8
New Mexico	24.5	17.9	37.4	29.5	18.2
New York	24.3	32.9	40.7	39.6	18.2
North Carolina	25.9	20.3	35.6	39.1	24.0
North Dakota	25.3	33.0	37.9	34.8	19.8
Ohio	16.5	28.6	39.5	34.9	16.5
Oklahoma	27.6	19.0	35.3	41.8	28.3
Oregon	14.6	29.0	40.2	31.0	22.5
Pennsylvania	26.1	28.9	39.3	34.1	17.1
Rhode Island	20.0	48.6	45.8	30.0	21.7
South Carolina	38.5	30.0	41.0	40.2	27.8
South Dakota	15.5	41.2	40.7	25.9	17.3
Tennessee	34.0	24.9	39.1	38.2	32.0
Texas	39.1	18.7	35.9	42.5	20.6
Utah	13.8	28.2	39.2	35.9	19.8
Vermont	26.5	43.4	45.0	32.9	26.2
Virginia	36.6	23.2	36.5	42.3	21.2
Washington	21.9	23.1	37.2	38.4	16.1
West Virginia	25.9	28.8	39.5	31.8	18.2
Wisconsin	9.6	26.8	39.1	33.8	17.3
Wyoming	38.8	31.6	41.8	42.7	23.1
U.S. Average	24.3	29.3	39.4	41.0	20.2

Figure 7.8

GOLF PARTICIPATION BY STATE

Figure 7.9

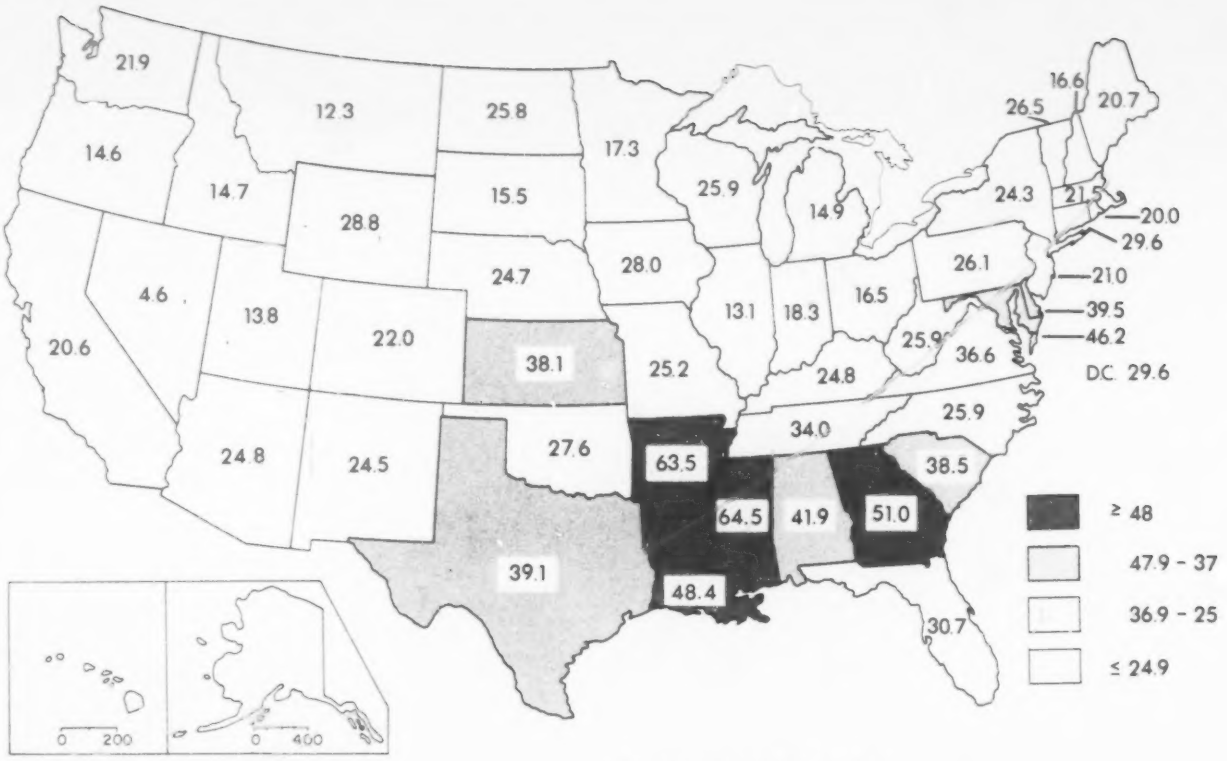
PERCENTAGE OF GOLF POPULATION - FEMALE



NGF/SPORT PLACE

Figure 7.10

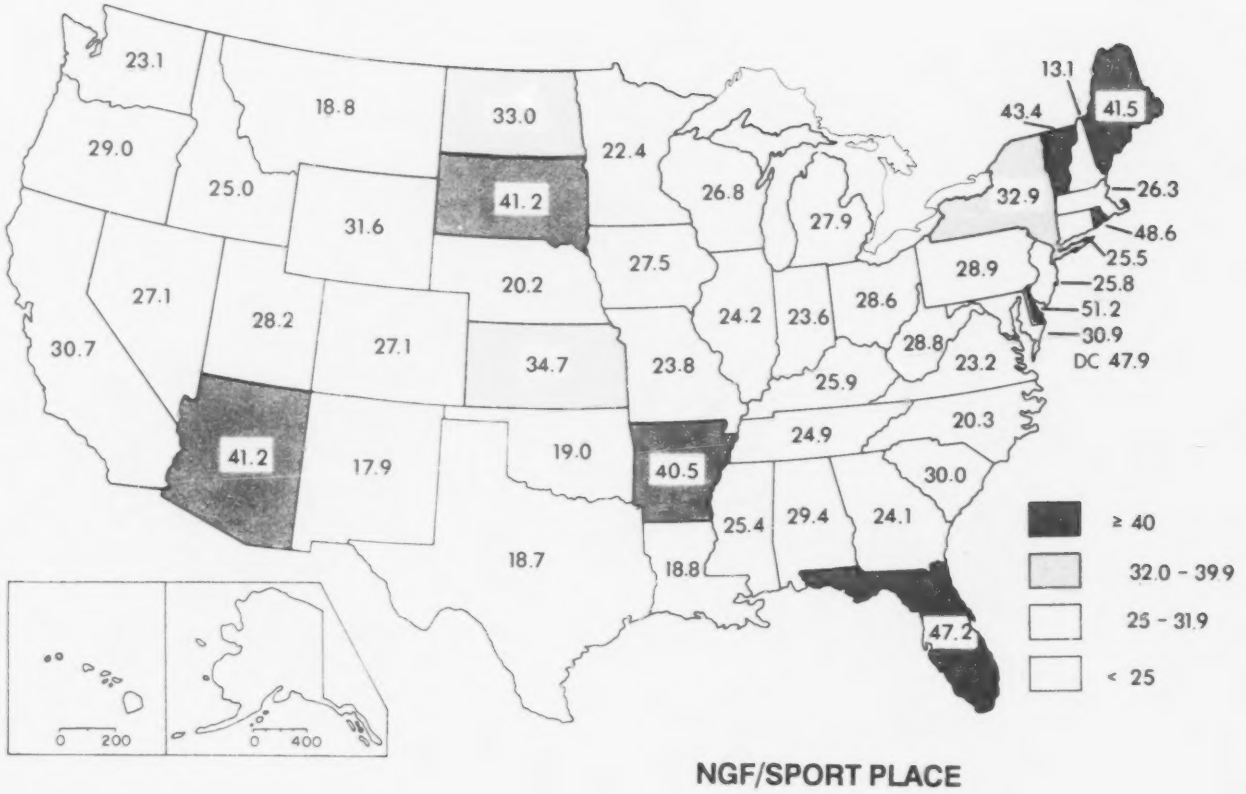
PERCENTAGE OF GOLF POPULATION - PRIVATE



NGF/SPORT PLACE

Figure 7.11

PERCENTAGE OF GOLF POPULATION - OVER 50



NGF/SPORT PLACE

APPENDIX A

Golf Population Over 50 Years Old

	Percent of Population	Number of Over 50 Year Golfers (millions)
Total	100.0	5.92
Male		
Female		
Income ($1,000):		
<10	5.5	0.33
10-20	17.8	1.05
20-30	18.6	1.10
30-40	17.1	1.01
40-50	14.3	0.85
50-75	17.7	1.05
>75	9.0	0.53
Region		
North East	21.3	1.26
North Central	31.9	1.89
South	24.9	1.47
West	21.9	1.30
Education		
Non High School	9.7	0.57
High School Grad.	29.0	1.72
Some College	24.6	1.48
College Grad.	36.7	2.17
Occupation		
Prof/Managerial	55.8	3.30
Clerical/Sales	19.0	1.12
Blue Collar	19.2	1.14
Other	6.0	0.36

APPENDIX A

Golf Population Over 65 Years Old

	Percent of Population	Number of Over 65 Year Golfers (millions)
Total	100.0	1.88
Male		
Female		
Income ($1,000):		
<10	9.2	0.17
10-20	30.9	0.58
20-30	22.5	0.42
30-40	14.9	0.28
40-50	8.4	0.16
50-75	10.3	0.19
>75	3.8	0.07
Region		
North East	20.2	0.38
North Central	31.2	0.59
South	28.7	0.54
West	19.9	0.37
Education		
Non High School	13.7	0.26
High School Grad.	29.7	0.56
Some College	27.8	0.52
College Grad.	28.8	0.54
Occupation		
Prof/Managerial	57.3	1.08
Clerical/Sales	27.5	0.52
Blue Collar	11.5	0.22
Other	3.7	0.07

APPENDIX B

The Questionnaire

(Please Read and Answer THIS Side First) (7-H449)

Dear Panel Member,

The questions on this card are all about GOLF. I'd like to know whether you or anyone in your household played GOLF in the PAST 2 YEARS.

The back of the card lists questions for each household member who has played golf in the past 2 years.

NOTE: I am not interested in golf played on miniature golf courses. Please do not include golf played on miniature golf courses in your answers.

Thank you for your help.

Cordially,

Wayne

1. Have you or has any member of your household played GOLF in the **past 2 years**? ("X" ONE)

Yes... [ ]1 (CONTINUE) No.. [ ]2 (THANK YOU. RETURN CARD.) (9)

2. How many members of your household played golf in the **past 2 years**? (WRITE IN NUMBER.) #_____ Household Members (10)

PLEASE REFER TO THE FOLLOWING GOLF COURSE DEFINITIONS WHEN ANSWERING QU. 6 ON THE OTHER SIDE OF THE CARD.

A private golf course is a golf facility that restricts play to members and their guests.
A daily fee golf course is a privately owned facility that is open to the public.
A municipal golf course is a facility that is owned by a tax supported agency such as a city, county, school or park district and is open to the public.

(Please Read and Answer OTHER Side First) (7-H449)

The questions below are about each household member who played golf at least once in the **PAST 2 YEARS.**

I would like you to act as my interviewer when answering these questions. First, write in the age and sex of each household member (up to five members) who played golf at least once in the past 2 years. Then ask questions 3-6 and record answers for each golfer in your household.

	Golfer #1	Golfer #2	Golfer #3	Golfer #4	Golfer #5
RECORD **AGE AND SEX** OF EACH MEMBER WHO PLAYED GOLF IN THE **PAST 2 YEARS**.....	Age ____	Age: ____	Age: ____	Age: ____	Age: ____
	Male [ ]1 Fem. [ ]2 (11-13)	Male [ ]1 Fem. [ ]2 (29-31)	Male [ ]1 Fem. [ ]2 (47-49)	Male [ ]1 Fem. [ ]2 (9-11)	Male [ ]1 Fem. [ ]2 (27-29)
3. How many years ago did you first start playing golf? (WRITE IN NUMBER OF YEARS.).....	____Years	____Years	____Years	____Years	____Years
4. Did you play golf in the **past 12 months**? ..... (IF "NO," GO TO COLUMN FOR NEXT GOLFER.)	Yes [ ]1 No [ ]2 (14-16)	Yes [ ]1 No [ ]2 (32-34)	Yes [ ]1 No [ ]2 (50-52)	Yes [ ]1 No [ ]2 (12-14)	Yes [ ]1 No [ ]2 (30-32)
5. About how many times did you play golf during the **PAST 12 MONTHS**? (WRITE IN NUMBER OF TIMES.).....	____Times (17-19)	____Times (35-37)	____Times (53-55)	____Times (15-17)	____Times (33-35)
6. Thinking about all of the rounds you played in the **PAST 12 MONTHS**, what percent of the rounds you played were played on ... (WRITE IN PERCENT FOR EACH.)					
Private courses.....	____%	____%	____%	____%	____%
Daily fee courses.....	____%	____%	____%	____%	____%
Municipal courses.....	____% (20-28)	____% (38-46)	____% (56-64)(80)1	____% (14-26)	____% (36-44)(80)2

APPENDIX C

Definitions

Golf Participation Rate:	The percentage of a demographic group who play golf. For example, the golf participation rate of people over 60 is 8.3 percent. This means 8.3 percent of people over 60 years old play golf.
Education & Occupation:	This refers to the education and occupation of the household head. Thus, for example, when referencing a junior's occupation, this report is referring to the occupation of the household head.
1986 Golf Participant:	Played golf at least once in 1986.
Junior Golfer:	Golfer under the age of 20.
Senior Golfer:	Golfer over the age of 60.
Frequent Golfer:	Played more than 25 rounds of golf in 1986.
Infrequent Golfer:	Played less than three rounds of golf in 1986.
Private Golfer:	Played more than 50 percent of their rounds of golf on private facilities.
Public Golfer:	Played more than 50 percent of their rounds of golf on public facilities.

FIFTY YEARS 1936 - 1986

NATIONAL GOLF FOUNDATION

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